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Creating, Opening, and Saving Charts

You can create a new <u>chart</u> either by starting from scratch or by opening an existing chart as a <u>template</u>. Select one of the topics below for more information.

Related topics

<u>Creating a Chart from Scratch</u>

<u>Opening a Chart as a Template</u>

<u>Opening an Existing Organization Chart</u>

<u>Saving a Chart</u>

<u>Closing a Chart</u>

<u>Deleting a Chart</u>

Creating a Chart from Scratch

To create a new chart:

1. From the File menu, select New (ALT, F, N).

   Org Plus displays the New Chart dialog box.

   In Org Plus, you type information directly into the chart boxes.   Each box contains one or more **fields** where you can type information.   Each field must have a label.   For example, in Org Plus the default label for people's names is "Name" and the default label for people's titles is "Title."   Label names appear in the fields until you type information over them.   This way, you know what information to type in which fields.

   The way labels are arranged is called the label setup.   In the New Chart dialog box, you can select a predesigned label setup, or you can choose to create your own label setup from scratch.   (You can always customize a predesigned label setup later.)   Charts can have up to 30 labels.

2. Click the label setup that best suits your needs and then click OK.
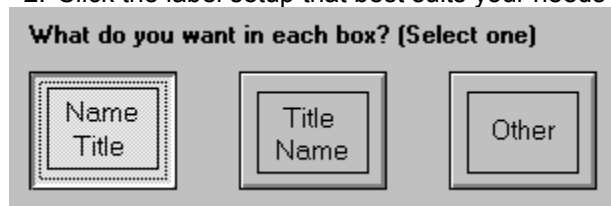
   For help with this decision, see "Using a Predefined Label Setup" and "Creating Your Own Labels."

Note: The New Chart dialog box does not appear if you have previously elected to use the topmost box of an existing chart as a template for boxes in new charts.   See "Changing Options for New Charts."

Related topics
Using a Predefined Label Setup

Creating Your Own Labels

Changing Options for New Charts

Using a Predefined Label Setup

If you only need to enter names and titles, choose the first or second <u>label setup</u> in the New Chart dialog box.   Org Plus starts your new <u>chart</u> with a single box showing the label setup you selected.

You can then start entering information.   See "Entering and Editing Information."   If necessary, you can create additional labels or change the way the labels are arranged.   See "Creating and Changing Labels" and "Changing the Label Setup" for more information.

You can also create your own predefined label setup and have Org Plus use it automatically for every new chart you create.   See "Changing Options for New Charts."

Related topics

<u>Entering and Editing Information</u>

<u>Creating and Changing Labels</u>

<u>Changing the Label Setup</u>

<u>Changing Options for New Charts</u>

Creating Your Own Labels

If you need to enter more or different information than names and titles, choose the third label setup, "Other," in the New Chart dialog box.   Org Plus displays the Define Labels dialog box.   If you aren't in the New Chart dialog box, from the Edit menu, select Define Labels (ALT, E, D).

In this dialog box you can create your own labels for the information that you want in each box.   You can also delete labels, although you **don't** have to delete old labels to make room for new ones until you have reached the limit of 30.   (Labels containing people's names take up 2 of the 30 labels.)

To delete either the Name or Title label, click the label and then click Delete.

To create your own labels:

1. In the New label field, enter a label name for a type of information that you want to include in your chart.

2. Depending on the type of information that this label will hold, select one of the This field contains option buttons.

   If the label is for names, select the "People's Names" option button.   For amounts, select the "Amounts" option button, for pictures, select the "Pictures" option button, and for all other text, select the "Text" option button.

3. Click Define.

4. Click OK when you are finished creating labels.

Org Plus opens your new chart with the labels you created arranged one above the other.   You can now start entering information.   If necessary, you can change the way the labels are arranged, see "Changing the Label Setup."   For more complete information about creating each type of label, see "Creating and Changing Labels."

Related topics

Creating and Changing Labels

Changing the Label Setup

Opening a Chart as a Template

Any chart can become a template for a new chart. When you open a chart as a template, you preserve all the formatting, annotations, and background objects of the original, but not the data in the boxes. The boxes in chart templates are empty so that you can type in a different set of names, titles, and other information. You can then save the new chart with a different name of your choosing.

To open an existing chart as a template for a new chart:

1. From the File menu, select Open (ALT, F, O).

    Org Plus displays the Open Chart dialog box.

2. In the File Name list, click the name of the chart that you want to use as a template.

3. Select the Template check box.

4. Click OK.

    Org Plus creates a new, untitled chart based on the chart you selected as a template. You can then modify the chart in any way.

Opening an Existing Organization Chart

Use these instructions to open an existing <u>chart</u>.   You can open up to four charts at the same time, depending on your system's configuration.   Org Plus uses the Organization Chart (OPX) file format. Org Plus for Windows version 3.0 can automatically open files created in Org Plus for Windows 1.0, 2.0, 2.01, 3.0 and later, Org Plus Advanced version 6.01 and later, and Microsoft Organization Chart version 1.0 and later.

To open an Org Plus for DOS chart (Org Plus version 3.1 or Org Plus Advanced version 4.0, 5.0, or 6.0), see "Opening Org Plus for DOS Files."

To open a file created in Org Plus for Windows version 1.0, 2.0, 2.01, 3.0, or later, Org Plus Advanced version 6.01 or later, or Microsoft Organization Chart version 1.0 or later:

1. From the File menu, select Open (ALT, F, O).

   Org Plus displays the Open Chart dialog box.

2. Locate the file you wish to open.

   - **File Name** – In this field, type the name of the file that you want to open.   The list directly below the "File Name" field contains the names of the files in the current directory.   If you click the name of a file in this list, Org Plus automatically places that file name in the "File Name" field.

   - **File formats** – Use this drop-down list to control what types of files Org Plus displays in the "File Name" list.   Click the drop-down list and then click the format corresponding to the type of file that you want to open.

   - **Directories** – Use this field to open and close directories when you are looking for your files.   To open a directory, double-click the directory name.   If you need more help using this field, see your Microsoft Windows User's Guide.   Unless you specify a different directory, Org Plus automatically saves charts to the Working Directory that is specified for Org Plus in your Windows Program Manager.   For more information about Working Directories,   See your Microsoft Windows User's Guide.

   - **Drives** – Use this field to change disk drives when you are looking for your files.   Click the drop-down list and then click a drive letter.

3. Click OK.

   Org Plus displays your chart.

Related topics
<u>Opening Org Plus for DOS Files</u>

Saving a Chart

The Save command on the File menu saves the current (active) <u>chart</u> to your disk.

When you save a chart for the first time, Org Plus displays the Save Chart dialog box so that you can give the chart a name.   From then on, Org Plus does not display the Save Chart dialog box when you save the chart, but automatically saves the chart with the name that you gave it.

If you want to save the chart with a different name, file format, or in a different location, you need to use the Save As command:

The Save As command on the File menu displays the Save Chart dialog box, from which you can do the following:

- Save the current chart under a different name by typing the name and clicking OK.

- Save the current chart with a different file format by choosing a format from the File formats drop-down list and then clicking OK.   You can find specific instructions for saving files in different formats in the topic "Importing and Exporting."

- Save to a different directory or disk by double-clicking the directory or drive name in the Directories or Drives list, then clicking OK.

Save your chart frequently!   Your chart is stored in the computer's electronic memory while you are working on it.   If you should lose power while working on a chart, all changes you have made since you last saved will be lost.

Closing a Chart

The Close command on the File menu (ALT, F, C) closes the current (active) <u>chart</u> without exiting from Org Plus.   You can also press Ctrl+W.   Org Plus warns you if the chart you want to close has not been saved, and gives you an opportunity to save it.

Deleting a Chart

If you no longer need a <u>chart</u>, you can delete it.   However, exercise caution when you use this command, because once you delete a chart you cannot retrieve it.

To delete a chart:

1. From the File menu, select Delete (ALT, F, D).

   Org Plus displays the Delete Chart dialog box.

2. Locate the file you wish to delete using the Drives, Directories, and File Name fields.

3. Make sure that the file name displayed is the name of the chart that you want to delete, then click OK.

   Org Plus deletes the chart.   You cannot retrieve it.

Creating and Deleting Boxes

You create a new box by clicking on an existing box with a box tool.   Org Plus automatically draws the box in the right place and lays out the lines connecting it to the existing box.   All boxes are **subordinates to**, co-workers **of**, **assistants to**, or **managers of** existing boxes.

For example, you create a new subordinate to an existing manager by first clicking the Subordinate box tool, and then clicking the manager's box.   Org Plus draws a new subordinate box below the manager's box with a line connecting it back to the manager.

For more complete instructions, see the topics listed below.

Related topics

Creating Any Type of Box

Creating Multiple Boxes of the Same Type

Inserting Managers and Topmost Boxes

Converting Boxes from One Type to Another

Alternate Ways to Create Boxes

Deleting Boxes

Creating Any Type of Box

The basic steps for creating a box of any type are the same:

1. Click the box tool for the type of box you want to create.

Subordinate:	:Co-worker	Co-worker:	Manager:	Assistant:
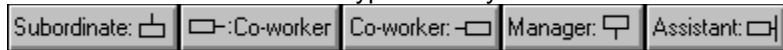
   Your pointer changes to a symbol for the type of box you want to create.

2. Click the box in your <u>chart</u> to which you want to attach the new box.

   Org Plus creates the desired type of box and reformats your chart.

Creating Multiple Boxes of the Same Type

Ordinarily, you use a box tool to create one box at a time.   To save time, there are two different shortcuts you can use to create multiple boxes of the same type.

#1:   Click a Box Tool Multiple Times

Click a box tool multiple times, once for each box you want to create.   Then, click a box in your chart. For example, to create six subordinates for a particular manager, click the Subordinate box tool 6 times, then click the manager's box.

The status area in the lower left corner of the window shows the number of boxes that will be created when you click in the chart with a box tool.   If you click a box tool too many times, click the Selection Arrow tool in the upper left corner of the window to clear the number of boxes.
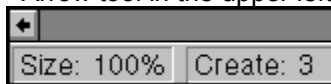
#2:   Use the Shift Key

Hold down the Shift key and click a box tool.   This "activates" the box tool so that you can create multiple new boxes without having to click the box tool once for each new box.   Just click the box in the chart to which you want to attach new box(es).   Each time you click a box, Org Plus creates a new box. When you are done creating new boxes, click the Selection Arrow tool in the top left corner of the window.   This "deactivates" the box tool.

Inserting Managers and Topmost Boxes

To insert a new <u>topmost box</u> or a new <u>manager</u> between one or more subordinates and their current manager:

1. Select the boxes for which you want to create a new manager.   If you want to insert a new topmost box, select the current topmost box.

   The boxes you select must belong to the same <u>group</u> and must be located next to each other.   If not, you must first move them next to each other.   See "Moving Boxes in Your <u>Chart</u>."

2. Press and hold the Ctrl key while you click the Manager box tool.

   Org Plus inserts a box above the selected boxes.

Related topics

<u>Moving Boxes in Your Chart</u>

Converting Boxes from One Type to Another

To convert a box from one type to another, you can drag it from its current location and reattach it to another box in your chart as a **co-worker before** (above or to the left), **co-worker after** (below or to the right), or subordinate.   For example, if there is an assistant in your chart and you want that assistant to become a regular co-worker of some other employees, drag that assistant box over a non-assistant box so that it becomes a co-worker to that non-assistant box.   For more information, see "Moving Boxes in Your Chart."

To convert a non-assistant box to an assistant box, select the box and choose an assistant style from the Style menu.   See "Changing Assistant Styles."

To do this...	Do this...
Convert a non-assistant to an assistant	Select the box and then from the Styles menu, select an assistant style
Convert an assistant to a regular subordinate	Drag the assistant box over a non-assistant box

Related topics

Moving Boxes in Your Chart

Changing Assistant Styles

Alternate Ways to Create Boxes

You can also create boxes by selecting an existing box first and **then** clicking a box tool or pressing a function key:

1. Click the box to which you want to attach a new box.

2. Press and hold the Ctrl key while you click a box tool.

   OR...

Press a function key for the type of box you want to create:

To do this...	Press this...
Create a subordinate to the selected box	F2
Create a co-worker before (to the left or above) the selected box	F3
Create a co-worker after (to the right or below) the selected box	F4
Create a manager for the selected box	F5
Create an assistant to the selected box	F6

Org Plus creates the type of box you want and reformats your chart.

Deleting Boxes

To delete one or more boxes:

1. Select the boxes you want to delete.

2. From the Edit menu, select Clear (ALT, E, E).

   Org Plus permanently deletes the boxes and their <u>connecting lines</u>.   If you want to be able to place the selected boxes in another location, you should use the Cut command instead of the Clear command.   With the Cut command, Org Plus places the boxes on the <u>Clipboard</u>.   You can then use the Paste command to place the boxes where you want them.   (The Cut and Paste commands are both on the Edit menu.)

When you delete a box, its subordinates, if any, are automatically promoted.   If you do not want this to happen, delete the text inside the box, not the box itself.

Entering and Editing Information

For information about entering and editing information, see one of the topics listed below.   To edit information that is not currently visible in the chart, see "Seeing and Editing Hidden Information."   To enter information **not** associated with a particular box, such as the title for your chart or other information that you want in the background of your chart, see "Annotating Your Chart."   To change the way information is arranged in a box, see "Changing the Label Setup."

Related topics

Entering New Information

Editing Existing Information

Editing Shortcuts

Entering People's Names

Creating and Changing Labels

Seeing and Editing Hidden Information

Searching Your Chart's Boxes for Information

Replacing Information

Annotating Your Chart

Changing the Label Setup

Entering New Information

Follow these steps to enter information in an empty box:

1. Click the box once.

   Org Plus highlights the box.   When you move the arrow pointer over an area where you can enter text, it changes to a text pointer.

2. Click the box a second time to activate it for editing.

   Alternatively, you can press Enter.

   Org Plus displays the labels for the information in the box.
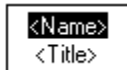
Note: Pay attention to the labels.   Be sure to enter the information that the <u>label</u> calls for.   By doing this, you can easily move or change the formatting of the information in your <u>chart</u>.   See "Changing the <u>Label Setup</u>."

3. Start typing.

   Your text replaces the label.

4. Click and type over any other label for which you want to enter information.   You can also press Tab to move from one label to another.

Related topics

<u>Changing the Label Setup</u>

Editing Existing Information

To edit existing information, click the box containing information you want to edit, then click the text you want to edit.

To make changes to text throughout your <u>chart</u>, press and hold the Shift key while you click the Text tool in the top left corner of the window (see picture below).   This activates the text pointer until you click the Selection Arrow tool (to the left of the Text tool).   With the text pointer activated, you can move from box to box and click directly on any text you want to edit without clicking the Text tool first.

Editing Shortcuts

The following table summarizes the keystrokes that help you enter information:

To do this...	Press this...
Select the next text item in the box	Tab, Enter, or Down Arrow
Select the previous text item in the box	Shift+Tab or Up Arrow
Enter information in a box to the right	Ctrl+Right Arrow
Enter information in a box to the left	Ctrl+Left Arrow
Enter information in a box above	Ctrl+Up Arrow
Enter information in a box below	Ctrl+Down Arrow
Close the box being edited	Esc

Entering People's Names

When entering people's names, always type the person's complete name.   Org Plus has 23 ways to abbreviate and format names, provided it knows the complete name to begin with.   See "Creating Labels for People's Names" for instructions.

Related topics

Creating Labels for People's Names

Creating and Changing Labels

You need to create labels for the information that you enter into your <u>chart</u>'s boxes.   You can create up to 30 different labels for your chart and each box can contain any combination of those labels.   (Labels that contain names use up 2 of the possible 30.)

You create, delete, rename, and make other changes to labels using the Define Labels dialog box.   To open the Define Labels dialog box, from the Edit menu, choose Define Labels (ALT, E, D).

For complete instructions, see one of the topics listed below.

Related topics

<u>Creating Labels for Text</u>

<u>Creating Labels for People's Names</u>

<u>Creating Labels for Amounts</u>

<u>Creating Labels for Pictures</u>

<u>Changing the Preset Sizing Options</u>

<u>Renaming Labels</u>

<u>Deleting Labels</u>

Creating Labels for Text

You must create labels for new types of information before you can enter the information into your chart's boxes.   For example, if you want to enter department names, you might want to create a label called "Department."

To create a label for text (other than names or numerical amounts):

1. From the Edit menu, select Define Labels (ALT, E, D).

   Org Plus displays the Define Labels dialog box .

2. Type a name for the new label in the New label field.

3. Select the Text option button.

4. Click Define.

5. Repeat steps 2 through 4 for each new text label you want to create.

6. Click OK to close the Define Labels dialog box.

   Org Plus asks if you want to add the newly defined labels to each box in your chart.

7. Click Yes or No.

   If you answer "Yes," Org Plus adds each new label to the bottom row of every box in your chart.   If you answer "No," the labels will not be added to each box.   However, you can add the labels to any or all boxes later by selecting the boxes in the chart and then, from the Edit menu, selecting Label Setup.   See "Changing the Label Setup" for more information.

Related topics

Changing the Label Setup

Creating Labels for People's Names

Org Plus has special commands for formatting people's names.   These commands are on the Name submenu of the Text menu.

However, to format names automatically, Org Plus needs to know which <u>label</u> you use for people's names.   (This is usually the label called "Name," but you may have created a label called "Employee" or "Prospect," for example.)

To create a label to hold people's names:

1. From the Edit menu, select Define Labels (ALT, E, D).

2. Type a name for the new label in the New label field.

3. Select the People's names option button.

   By selecting the "People's Names" option button, you will be able to reformat all of the names in your <u>chart</u> using one command.

4. Click Define.

5. Repeat steps 2 through 4 for each new name label you want to create.

6. Click OK to close the Define Labels dialog box.

   Org Plus asks if you want to add the newly defined labels to each box in your chart.

7. Click Yes or No.

   If you answer "Yes," Org Plus adds each new label to the bottom row of every box in your chart.   If you answer "No," the labels will not be added to each box.   However, you can add the labels to any or all boxes later by selecting the boxes in the chart and then, from the Edit menu, selecting <u>Label Setup</u>.   See "Changing the Label Setup" for more information.

From now on, you can select any box in your chart that contains a name and reformat the name automatically.   See "Changing People's Name Formats," for more information.

Note: When entering people's names in your chart, it is useful to type at least the complete first and last names.   The more complete the names, the more flexibility you will have when choosing name formats. For example, if you enter complete names, you can later choose a name format that includes people's middle initials.   However, if you do not enter complete names, this is not a valid option.

Every label that is used for people's names takes up **two** of the 30 total available labels you can have in your chart.

Related topics

<u>Changing the Label Setup</u>

<u>Changing People's Name Formats</u>

Creating Labels for Amounts

Org Plus has special commands for working with numbers (<u>Amounts</u>).   However, to use the Amounts commands, you must first tell Org Plus which labels hold Amounts.

To create a <u>label</u> to hold Amounts:

1. From the Edit menu, select Define Labels (ALT, E, D).

2. Type a name for the new label in the New label field.

3. Select the Amounts option button.

   By selecting the "Amounts" option button, you will be able to use this label to manipulate numbers in your <u>chart</u>.   In addition, depending on how you define this Amounts label, and depending on the other Amounts labels that you define in your chart, you may be able to perform calculations with the numbers that you enter in this field in your chart's boxes.

4. Click Define.

5. Repeat steps 2 through 4 for each new amount label you want to create.

6. Click OK to close the Define Labels dialog box.

   Org Plus asks you if you want to add the newly defined labels to each box in your chart.

7. Click Yes or No.

   If you answer "Yes," Org Plus adds each new label to the bottom row of every box in your chart.   If you answer "No," the labels will not be added to each box.   However, you can add the labels to any or all boxes later by selecting the boxes in the chart and then, from the Edit menu, selecting <u>Label Setup</u>.   See "Changing the Label Setup" for more information.

From now on, you can use the Amounts commands to do calculations with the numbers in your chart. See "Using Amounts: Your Chart as a Spreadsheet" for more information about formatting numbers and doing calculations in your chart.

Related topics

<u>Changing the Label Setup</u>

<u>Using Amounts: Your Chart as a Spreadsheet</u>

Creating Labels for Pictures

If you want to include pictures, such as employee photos, in your <u>chart</u>'s boxes, you need to create a <u>label</u> for the picture, just as you created a label for names and another label for titles.   You might call the label "Photo."

To create a label for pictures:

1. From the Edit menu, select Define Labels (ALT, E, D).

2. Type a name for the new label in the New label field.

3. Select the Pictures option button.

   The "Pictures" option button will allow you to easily resize all of the pictures in your chart at once.   If you want to specify a uniform size for your pictures, see "Changing the Preset Sizing Options."

4. Click Define.

5. Repeat steps 2 through 4 for each new picture label you want to create.

6. Click OK to close the Define Labels dialog box.

   Org Plus asks if you want to add the newly defined labels to each box in your chart.

7. Click Yes or No.

   If you answer "Yes," Org Plus adds each new label to the bottom row of every box in your chart.   If you answer "No," the labels will not be added to each box.   However, you can add the labels to any or all boxes later by selecting the boxes in the char, and then, from the Edit menu, selecting <u>Label Setup</u>.   See "Changing the Label Setup" for more information.

From now on, you can select any box in your chart, select the label for the picture, and then place a picture at the location of the label.   See "Placing Pictures in Your Chart" for more information.   To change the location of the picture label in some or all boxes, see "Changing the Label Setup."

Note: You do not have to create a label for pictures that you place in your chart's background.   For information about placing pictures in your chart's background, see "Placing Pictures in the Background of Your Chart."

Related topics

<u>Changing the Preset Sizing Options</u>

<u>Changing the Label Setup</u>

<u>Placing Pictures in Your Chart</u>

<u>Placing Pictures in the Background of Your Chart</u>

Changing the Preset Sizing Options

When the pictures in your <u>chart</u> are of varying sizes, your chart can have an irregular appearance.   You can minimize this effect by using Org Plus to resize your pictures.

To make your pictures all the same size:

1. From the Edit menu, select Define Labels (ALT, E, D).

2. Select the <u>label</u> for pictures.

3. Click Sizing.

   Org Plus displays the Picture Sizing dialog box.

4. Select the Scale to fit area option button.

5. Enter the dimensions of the area in which you want your pictures to fit.

   Org Plus will scale your pictures proportionally to fit within the specified area.   If you do not want your pictures to scale proportionally, select the "Allow distortion" check box.   Org Plus will then give your pictures the precise dimensions that you enter.

6. Click OK.

7. Click Define.

8. Click OK to close the Define Labels dialog box.

Note: Most pictures lose quality when you resize them.   For best results, do not take pictures with the intention of resizing them later.   Make original photos the size at which you will display and print them in Org Plus.   In addition, be aware that changing the size at which you view your chart will **not** change the quality of pictures in your chart.

Renaming Labels

To rename a label:

1. From the Edit menu, select Define Labels (ALT, E, D).

2. Click the label you want to rename.

Labels in chart:

Name
Title

3. Type the new name for the label.

4. Click Define.

5. Click OK to close the Define Labels dialog box.

Deleting Labels

When you delete a label, Org Plus deletes all the information in your chart's boxes that has that label. For example, if you delete the Department label, Org Plus deletes all the departments listed in your chart's boxes.   In addition, when you delete an Amount label that is part of a formula, that formula is no longer valid.   Deleting a label is a quick way to delete information from the boxes in your chart, but use it with caution.

To delete a label:

1. From the Edit menu, select Define Labels (ALT, E, D).

2. Click the label you want to delete.

3. Click Delete.

   Org Plus asks if you really want to delete the label.

4. Click Yes.

5. Click OK to close the Define Labels dialog box.

   To undo the deletion, from the Edit menu, select Undo immediately after deleting the label (ALT, E, U).

Seeing and Editing Hidden Information

If you have hidden some of the information in your chart, you can temporarily see and edit it.   From the View menu, select Show Hidden Labels (ALT, V, H).   Org Plus adds the hidden information to the bottom of each box in the chart.   A check mark appears next to this command when hidden text is visible in your chart.

When you are finished editing the hidden information and are ready to hide it, select the Show Hidden Labels command a second time.

To find out how to hide information in your chart, see "Showing/Hiding Information by Changing the Label Setup."

Related topics

Showing/Hiding Information by Changing the Label Setup

Searching Your Chart's Boxes for Information

With the Find command, you can locate boxes in your chart that contain specific information.   You can also use this command to find boxes that contain empty or non-empty fields or to find fields that have been excluded from Amounts calculations.   Please note that although you use the Find command to search for text, it highlights **boxes**, not the text within your chart's boxes.   If you want to highlight and optionally replace **text**, use the Replace command, described in "Replacing Information."

You can perform complicated searches with Org Plus's Find command, using multiple fields and "and/or" operators.   When you begin a search, you can either have Org Plus select and display one matching box at a time, or select and display all matching boxes when the search is completed.

To find information in your chart's boxes:

1. From the Edit menu, select Find (ALT, E, F).

   Org Plus displays the Find dialog box.

2. Define your search.

   • Label **name** – Click this drop-down list to select the field in your chart's boxes that you want to search.   To search all fields, select "Any field."

   • **Comparison** – Click this drop-down list to define how Org Plus compares the information contained in your chart with the information that you type into the "Contents" field.   Among your choices are "contains," "equal to," "excluded from count," and "excluded from comp."   When you search for Amounts, the numbers on **screen** may differ from the actual **value** in the Amount field.   Any differences stem from formatting selections you made, such as how many digits you want to the right of the decimal point.   To search for what you see on screen, it is best to use "contains."   Only use "equal to" when you are sure of the exact value.

   • **Contents** – In this field, type the information that you want to find.   Depending on what you chose as a Comparison phrase, you may not need to fill in this field.   For example, if you chose "is empty" or "excluded from count" as a Comparison phrase, filling in this field would not make sense.

   • **And/Or** – If you want Org Plus to search more than one field, click in this drop-down list to select either "and" or "or."   Otherwise, leave this field blank.

     The order in which Comparison phrases and "and/or" are interpreted is as follows: Comparison phrases are given the highest priority, followed by "and," and finally by "or."   For example, if your search expression said "Name equals Sam and Salary less than 100 or Salary greater than 2000," Org Plus would interpret it as "((Name equals Sam) and (Salary less than 100)) or (Salary greater than 2000)."   This means that Org Plus would find anyone named Sam who earned less than 100. Org Plus would also find anyone earning more than 2000, not just people named Sam earning more than 2000.

   • **Select All Matching Boxes** – Select this option button to have Org Plus simultaneously highlight all boxes that contain matching information.   Org Plus will position the chart so that you can see the first box that was found.   You then can manually move through the chart to see the other boxes that are highlighted.

   • **Go to First Matching Box** – Select this option button to have Org Plus highlight only one matching box at a time.   Org Plus begins by selecting the first box that was found.   You can move on to the

next matching box as needed.

- **Match Case** – If you only want Org Plus to find words that are capitalized the same way as the text you typed in the "Contents" field, select this check box.   Please note that this option only applies when you select "Contains" as your Comparison phrase.

- **Whole Word Only** – If you only want Org Plus to find complete words that match what you typed in the "Contents" field, and not pieces of other words, select this check box.   For example, if you typed the name "Smith" and selected the "Whole Word Only" check box, Org Plus would find any occurrences of "Smith," but it would not find names such as "Smithe" or "Smithson."   Please note that this option only applies when you select "Contains" as your Comparison phrase.

3. Click OK.

   Org Plus starts the search from the box that is currently selected and works its way down to the bottom of the chart.   If no box is selected, the search automatically begins from the top box.   If multiple boxes are selected, the search starts from the first selected box.

4. Org Plus highlights the matching box(es).

   If you selected the "Select All Matching Boxes" check box, Org Plus highlights all of the matching boxes simultaneously.   You can move around through the chart to see all of the matching boxes.   If you selected the "Go to First Matching Box" check box, Org Plus highlights only the first matching box.   To see additional matching boxes, from the Edit menu, select Find Next.   Alternatively,   you can press Ctrl+F.

5. If you did not begin your search at the top of your chart, Org Plus asks if you want to continue the search from the top of the chart when it gets to the bottom of your chart.   Click "Yes" to continue searching from the top or click "No" to quit the search.

Related topics

Replacing Information

Replacing Information

With the Replace command, you can locate and replace text in your chart's boxes.   Unlike the Find command, which executes a "visual query," similar to a database query, and identifies matching boxes, the Replace command can be used to find and optionally replace specific words within a box.

If you want to, you can use the Replace command on a set of boxes that you select instead of on the entire chart.   Simply select the set of boxes before you start with step 1 below.   For example, you could use the Find command to select a set of boxes that match a query; then use the Replace command to replace text in the set of matching boxes.

To replace text in your chart's boxes:

1. From the Edit menu, select Replace (ALT, E, R).

   Org Plus displays the Replace dialog box.

2. Define your search.

   - **Find** – In this field, type the text that you want to find.

   - **In** – Click this drop-down list to select the field that you want to search.   If you want to search all fields, select "Any field."

   - **Replace with** – In this field, type the text that you want to use as replacement text.   If you do not want to replace what you find, leave this field blank.

   - **Whole Word** – If you only want Org Plus to find complete words that match what you typed in the "Find" field, and not pieces of other words, select this check box.   For example, if you typed the name "Smith" and selected the "Whole Word" check box, Org Plus would find any occurrences of "Smith," but it would not find names such as "Smithe" or "Smithson."   When you are working with Amounts fields, Org Plus automatically selects "Whole Word."

   - **Match Case** – If you only want Org Plus to find words that are capitalized the same way as the text you typed in the "Find" field, select this check box.

3. Click OK.

   Org Plus starts the search from the box that is currently selected and works its way down to the bottom of the chart.   If no box is selected, the search automatically begins from the top box.

4. If no matches are found, Org Plus tells you so.   If Org Plus finds a match, it displays a dialog box containing the following buttons:

   - **Find Next** – Click this button to find and move to the next match without replacing the currently highlighted text.

   - **Replace** – Click this button to replace the currently highlighted text and move on to the next match.

   - **Replace All** – Click this button to replace all remaining matching text.

   - **Cancel** – Click this button to quit the search.

5. If you did not begin your search at the top of your chart, Org Plus asks if you want to continue the search from the top of the chart when it gets to the bottom of your chart.   Click "Yes" to continue searching from the top or click "No" to quit the search.

Selecting Boxes and Lines

In order to change a box or line, you must first select it. For instructions, see the topics listed below.

Related topics

Selecting a Single Object

Selecting Multiple Objects

Selecting All Objects of the Same Type

Selecting a Group

Selecting a Branch

Selecting All Boxes at the Same Level

Selecting All Boxes

Keyboard Shortcuts for Selecting Boxes

Selecting a Single Object

You can select any single <u>object</u> in your <u>chart</u> by placing the arrow pointer over it and clicking.   If you have trouble doing this, try magnifying your chart first.   See "Viewing and Moving Around Your Chart."

Related topics

<u>Viewing and Moving Around Your Chart</u>

Selecting Multiple Objects

To select multiple objects, Shift-click them or use the arrow pointer to drag an outline around them.

By Shift-clicking

To select objects in scattered locations, press and hold the Shift key while you click them.   To remove any individual item from the selection, click the selected <u>object</u> a second time while pressing the Shift key.

By Dragging an Outline

To select objects located next to each other, drag an outline around them.   To drag an outline, first click the selection arrow tool in the upper left-hand corner of the window.   Then position the pointer over one corner of the rectangular area that you want to select.   Finally, click the mouse button and drag the pointer to the diagonally opposite corner of the rectangle.   Objects are selected only when they are within the outline and are highlighted.

To remove a box, line, or other unwanted object from the selection, Shift-click the object.   (See "By Shift-clicking" above.)

Selecting All Objects of the Same Type

To select all objects of the same type, from the Edit menu, choose Select (ALT, E, S), and then make a selection from the Select submenu that Org Plus displays.

Why Would You Want to Select All Objects of the Same Type?

Selecting all objects of the same type can help you keep the formatting in your <u>chart</u> consistent.   For example, you might want to select all <u>manager</u> boxes in order to give them a shadow or other special formatting.

Selecting a Group

To select a <u>group</u> – all boxes reporting to the same <u>manager</u> – double-click any box within the group.

You can also click any box within the group and then from the Edit menu, choose Select (ALT, E, S). Finally, choose Group from the submenu that Org Plus displays.   Alternatively, you can click any box within the group and then press Ctrl+G .

Selecting a Branch

To select a <u>branch</u> first select the <u>manager</u> box.   Then, from the Edit menu, choose Select (ALT, E, S). Finally, choose Branch from the submenu that Org Plus displays.   Alternatively, you can click the manager box and then press Ctrl+B.

Selecting All Boxes at the Same Level

The topmost box in your chart is at level 1.   The boxes reporting directly to it are at level 2.   The boxes reporting directly to them are at level 3, and so on.

To select all boxes at the same level:

1. From the Edit menu, choose Select Levels (ALT, E, V).

   Org Plus displays the Select Levels dialog box.

   Enter the levels of the boxes you want to select and click OK.   For example, to select all the boxes at level 4, you would enter "4" in both fields in the dialog box.

2. Click OK.

   Org Plus highlights the boxes at the level that you chose.

Why Select All Boxes at the Same Level?

Because boxes at the same level in an organization generally have the same status.   To show this, give them the same visual features, such as fonts, borders, and label setups.

See "Changing the Label Setup," and "Changing Text Styles," for ways to change the visual features of boxes.

Related topics

Changing the Label Setup

Changing Text Styles

Selecting All Boxes

To select all the boxes in your <u>chart</u>, from the Edit menu, choose Select (ALT, E, S).   Then, choose All from the submenu that Org Plus displays.   Alternatively, you can press Ctrl+A.

Keyboard Shortcuts for Selecting Boxes

When a box is selected, you can use any of the following keystroke combinations to select neighboring boxes:

To do this...	Press this...
Select all boxes and lines	Ctrl+A
Select a <u>group</u>	Select one box in the group, then press Ctrl+G
Select a <u>branch</u>	Select the <u>topmost box</u> in the branch, then press Ctrl+B
Select the next box to the left	Ctrl+Left Arrow
Select the next box to the right	Ctrl+Right Arrow
Select the next box up	Ctrl+Up Arrow
Select the next box down	Ctrl+Down Arrow

Related topics

<u>Mouse and Keyboard</u>

Viewing and Moving Around Your Chart

There are several different ways to move through your <u>chart</u>.   You can also view your chart at different magnifications.   For complete instructions, see the topics listed below.

Related topics

<u>Viewing Your Chart at Actual, Enlarged, and Reduced Sizes</u>

<u>Using the Reduce/Enlarge Tool</u>

<u>Moving Left, Right, Up, or Down</u>

<u>Using the Thumbnail</u>

<u>Keyboard Shortcuts for Viewing and Moving</u>

<u>See Any Box in Your Chart</u>

Viewing Your Chart at Actual, Enlarged, and Reduced Sizes

To change the size of your chart on screen, you can use the View menu commands.

- To see your entire chart on the screen, choose Size to Window (ALT, V, S)

- To see as much as possible while keeping the text as legible as possible, choose 50% of Actual (ALT, V, 5).

- To see how any part of your chart will look when printed, choose Actual Size (ALT, V, A).

  We designed the Actual Size command so that it shows text to be somewhat larger (approximately 50% larger when using an EGA or VGA monitor) than it is when printed.   We feel that most charts use small fonts, and the additional magnification will make editing easier.

- To get an oversized view of any part of your chart, choose 200% of Actual (ALT, V, 2).

You can also press the function key shortcuts shown in the View menu.

When you choose Size to Window, the status area (in the lower left corner of the window) shows the percent of Actual Size.   For example, "Size: 67%" means that the chart has been reduced to 67% of Actual Size in order to fit in the window.   No matter what percent is shown, however, your chart always prints at its full size.

Note: Depending on the size of your screen and of your chart, there may be little or no difference between Size to Window and 50% of Actual.

Related topics

Using the Reduce/Enlarge Tool

Using the Thumbnail

General Purpose Tools

Using the Reduce/Enlarge Tool

The Reduce/Enlarge tool is the third tool from the left in the top left corner of your window.   It appears either as a magnifier or a little chart symbol, depending on the current level of magnification.

If your underline chart is shown at 50% of Actual or at Size to Window, you'll see a magnifier (see the figure below, left).   If your chart is shown at Actual Size or at 200% of Actual, you'll see a little chart symbol (see the figure below, right).
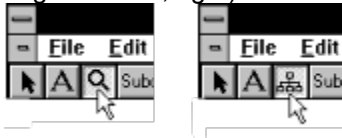
You can use the Reduce/Enlarge tool to switch between Size to Window and Actual Size.   Click the tool, then click in the area of your chart that you want to reduce or enlarge.   If your chart is at Actual Size, a click shows the entire chart.   If your chart is reduced, a click magnifies the area under your magnifier.

Related topics

Viewing Your Chart at Actual, Enlarged, and Reduced Sizes

Using the Thumbnail

General Purpose Tools

See Any Box in Your Chart

You do not have to click the Reduce/Enlarge tool.   Instead, you can press Shift+Ctrl. This gives you a convenient way to see any box in your <u>chart</u>:

If you are at Size to Window or 50% of Actual, press Shift+Ctrl and click the box you want to see more closely.

If you are at Actual Size or 200% of Actual, press Shift+Ctrl and click anywhere in your chart.   Org Plus displays the entire chart.   With Shift+Ctrl still down, click the box you want to see more closely, and Org Plus enlarges it.

Moving Left, Right, Up, or Down

You can use the standard Windows scroll bars to move through your <u>chart</u>.   Scrolling will be fastest if you are viewing your chart at 200% of Actual.   If you do not know how to use the scroll bars, see your Microsoft Windows User's Guide.

Using the Thumbnail

A thumbnail is a small sketch of an entire chart.   You can display a thumbnail of the chart that you are currently working with and then use it to navigate through your chart.   To do display a thumbnail, from the View menu, select Show Thumbnail (ALT, V, T).

The thumbnail contains all of the chart's boxes and connecting lines, but not shadows, background objects, titles, margin lines, or headers and footers.   Chart boxes retain their colors in the thumbnail, but not their shapes, and lines are always solid black.   In addition, if the chart is more than one page, the thumbnail will contain dotted lines to indicate the page breaks.

The thumbnail of your chart always contains a large rectangle.   This rectangle indicates which section of your chart is currently visible on your screen.   You can click anywhere in the thumbnail to move around in your chart.   Simply click the spot to which you want to move.   Org Plus centers your chart on that location.

If you would like to move the thumbnail to a different location on your screen, simply click its title bar and drag it to a new location.   If you would like to close the thumbnail, from Org Plus's View menu, select Hide Thumbnail.   Alternatively, you can use the thumbnail's Control menu (the minus sign in the upper left-hand corner).   Simply click the Control menu and then select Close.

Related topics

Viewing Your Chart at Actual, Enlarged, and Reduced Sizes

Using the Reduce/Enlarge Tool

General Purpose Tools

Keyboard Shortcuts for Viewing and Moving

The following table summarizes the keystrokes that let you view and move around in your <u>chart</u>.

To do this...	Press this...
See your entire chart in the window (size it to fit in your window)	F9
See your chart at 50% of Actual Size	F10
See your chart at Actual Size	F11
See your chart at 200% of Actual Size	F12
See the part of your chart above the window	PgUp
See the part of your chart below the window	PgDn
See the part of your chart to the left of the window	Ctrl+PgUp
See the part of your chart to the right of the window	Ctrl+PgDn
See the <u>topmost box</u> of your chart	Home
See the boxes at the bottom left of your chart	End

Related topics

<u>Mouse and Keyboard</u>

Printing Your Chart

There are three different ways to print your charts: one whole <u>chart</u> at a time, one <u>branch</u> of a chart at a time, or multiple charts at once.   For more complete instructions, see the topics listed below.

Related topics

<u>Printing a Whole Chart</u>

<u>Printing a Branch</u>

<u>Batch Printing</u>

Printing a Whole Chart

To print a <u>chart</u>:

1. From the File menu, select Print (ALT, F, P).

    Org Plus displays the Print dialog box.

    The Print dialog box may vary depending on your printer or your version of Windows.

2. Select the print options you want.

    - **Print Range** – Select one of these option buttons to choose which part of the chart to print. Pages print in the following order: left to right, then top to bottom. For example, page 2 is to the right of page 1. If you want to print only one page, enter that page number in both the "From" and "To" fields.

    - **Print Quality** – The options available from this drop-down list will vary from printer to printer. In general, the higher the number of dots per inch, the darker and sharper your printed image will be.

    - **Copies** – In this field, enter the number of copies that you want to print.

    - **Print Color** – Select this check box to print in color if you have a color printer, or to print in grayscale if you do not.

    - **Collate Copies** – Select this check box if you are printing multiple copies of your chart, and want to print complete sets, instead of multiple copies of the first page, and then multiple copies of the second page, and so on.

    - **Scaling** – If you selected the "Auto Shrink" check box in the Make Fit dialog box, this option will already be filled in. If not, use these two option buttons to select the size of your printed chart. To print your chart at full size, select the "100%" option button. To shrink your chart so that it fits on fewer pages than it would at 100%, select the "Fit chart to" option button and enter numbers representing how many pages wide and tall you want your printed chart to be. When you print, Org Plus will shrink your chart proportionally until it fits in the most constraining dimension.

3. Click OK to begin the print operation.

    Once you click OK, printing is managed by Windows. You must use Windows to cancel printing. See your Windows User's Guide for more information.

Printing a Branch

You can print any individual <u>branch</u> of your <u>chart</u> independently of the rest of the chart.

To print a branch of your chart:

1. Select the <u>topmost box</u> in the branch.

2. From the File menu, select Print (ALT, F, P).

3. Choose the Selected Branch option button in the Print Range field.

4. Click OK to begin the print operation.

   Org Plus centers the selected branch on the page, and prints the titles for the full chart.   It does not print objects in the chart background, such as annotations or pictures.   To print a branch with different titles or with background objects, copy the branch and selected objects to a new chart, place the objects where you want, enter new titles, then print the chart.   See "Cutting and Pasting Between Charts."

Related topics

<u>Cutting and Pasting Between Charts</u>

Batch Printing

With batch print, you can print several different charts all at once.   In addition, if you have groups of charts that you print on a regular basis, Org Plus lets you save the groups in special lists so that it is quick and easy to select a group for printing.

There are three main steps to batch printing:

1. Create a new list of files to print or open an existing list of files to print.

2. Specify the print settings.

3. Tell Org Plus to print.

Each of these steps is described thoroughly below.

To batch print a group of charts:

1. From the File menu, select Batch Print (ALT, F, B).

   Org Plus displays the Batch Print dialog box.

2. Prepare a list of files to print.

   - **File Name, Drives, Directories** − Use these fields to locate files that you want to print.

   - **List Files of Type** − Use this drop-down list to control which file formats are displayed in the "File Name" field.

   - **Files to Print** − The files listed in this field will be included in the batch print.

   - **Add** − To add a file to the "Files to Print" list, select the file in the "File Name" field and then click "Add."

   - **Add All** − To add all of the files currently listed in "File Name" field, click "Add All."

   - **Remove** − To remove a file from the "Files to Print" list, select the file in the "Files to Print" list and then click "Remove."

   - **Remove All** − To remove all of the files currently listed in the "Files to Print" list, click "Remove All."

   - **Open Print List** − To open a list of files that you previously saved, click "Open Print List."   Org Plus displays the Open Print List dialog box where you can use the "File Name," "Drives," and "Directories" fields to locate the print list that you want to open.   When you have located the list that you want, click OK to return to the Batch Print dialog box.   Org Plus adds the files to the "Files to Print" list.   If you need to, you can modify the list, but to save the changes, you must save the list again.

   - Save Print List − If you print a particular group of files on a regular basis, saving a list of those files will save you time in the future.   To save the current "Files to Print" list, click "Save Print List." Org Plus displays the Save Print List dialog box where you can give the list a name.   When you have given the list a name, click OK to return to the Batch Print dialog box.

3. Click OK when you have created your list.

   Org Plus displays the Batch Print dialog box.

4. Select the print options you want.

   - **Print Quality** − The options available from this drop-down list will vary from printer to printer.   In

general, the higher the number of dots per inch, the darker and sharper your printed image will be.

- **Copies** – Enter the number of copies that you want to print of each <u>chart</u>.

- **Print Color** – Select this check box to print in color if you have a color printer, or to print in grayscale if you do not.

- **Collate Copies** – Select this check box if you are printing multiple copies of each chart, and want to print complete sets, instead of multiple copies of the first page, and then multiple copies of the second page, and so on.

5. Click OK to begin the print operation.

Once you click OK, printing is managed by Windows.   You must use Windows to cancel printing. See your Windows User's Guide for more information.

Note: Any charts in your batch print that contain a Last Print Date field will be updated and re-saved automatically to reflect the current date.   If you are printing the chart on a different printer than the one for which the chart was originally formatted, any formatting changes made to the chart due to the change in printers will also be saved.

Customizing Org Plus

You can select options which tell Org Plus how you want your new charts to look.   "Changing Options for New Charts," below, tells you how to do this.

Related topics

Changing Options for New Charts

The Art of Charting

Time-saving Measures

Changing Options for New Charts

With Org Plus, you can select options that dictate the characteristics of new charts.   Included in the options that you can choose are the following: chart margins, text styles, the chart background color, and whether or not the drawing tools are visible.

To change the options:

1. Prepare a chart that has the settings you want all your new charts to have.

   See the "Settings" table, below, for a list of the settings you can change and instructions for changing them.

2. From the Edit menu, select Options (ALT, E, N).

   Org Plus displays the Options dialog box.

3. Verify that each option is the way you want it.

   If you select the "Use topmost box as template" check box, Org Plus will not display the New Chart dialog box when you create new charts.   Instead, Org Plus will use the topmost box in your current chart as a template for all the boxes in your new chart.   The boxes in your new chart will have the same labels, label setup, fonts, sizes, styles, alignment, borders, and shadow as the topmost box in your current chart.

4. Click OK.

   Org Plus confirms the settings and closes the dialog box.

Settings	How to change them
Box setup, including colors, fonts, and the label setup	Make the topmost box look the way you want all your boxes to look, including the label setup, fonts, sizes, styles, border, shadow, and colors
Chart Margins	Drag the margins where you want them. See "Changing Chart Margins" for more information
Quantity of magnification	Choose the desired quantity of magnification (View menu)
Background color	Choose a color from the Background Color submenu (Chart menu)
Chart Styles	Click in the chart background, then choose a group style (Styles menu). Repeat to choose an assistant style
Symbols	Choose Show or Hide Symbols (View menu)
Draw tools	Choose Show or Hide Draw Tools (View menu)
Page lines	Choose Show or Hide Page Lines (View menu)
Centering	Choose Center Up/Down or Center Left/Right (Chart menu)

Related topics
Changing Your Chart Margins

The Art of Charting

The secret to creating effective organization charts is to remember their purpose: **to graphically communicate the basic structure of an organization**. Your <u>chart</u> should make it easy to determine who reports to whom and what relationship one box or <u>group</u> of boxes bears to another.

Well-designed charts convey this information quickly and accurately. Poorly designed charts take a long time to figure out and can confuse or mislead the viewer.

Some of the following guidelines have been adapted from "Charting the Company Organization Structure," National Industrial Conference Board, Inc., New York, N.Y., 1959.

Keep Your Chart Simple

The best use of an organization chart is to show how the organization is structured − the basic organizational units and the chain of command.

An organization chart is **not** a very good tool for showing the many indirect, informal relationships that exist in most organizations. In practice, most organizations are extremely complex. Attempting to show that complexity in the chart often produces unintelligible charts.

Keep Your Chart Uncluttered

In general, the more information on the page, the more confusing the chart.

Use extra lines or text sparingly. Use white space − empty space on the page − rather than boxes or lines to show separations between groups.

Keep Your Chart Small

A reader can understand a smaller, less cluttered chart much more quickly than a larger chart. A smaller chart can communicate the essence of the organization much more quickly, and also has the important advantage of fitting on a single page.

If you have a large organization chart, break it up into separate charts by division or department. See "Working with Multiple Charts" for instructions.

Sometimes you want the entire chart to fit on a single page, even if that makes it look crowded. See "Making Your Chart More Compact," for ideas on how to make your chart more compact without compromising readability.

Be Consistent

Think of your chart as an arrangement of groups of boxes. Treat boxes with equal status in an equal and consistent way.

This rule applies to many elements of the chart design, as described below.

Box Sizes

Use the same size box, especially for boxes at the same <u>level</u> or in the same group. The more box sizes vary, especially within a group, the more uneven your chart appears.

In general the following rules work best:

- Make all boxes at the same level the same height and width.

- Let no box be wider than its <u>manager</u>'s box.

Org Plus automatically sizes boxes according to these rules unless you disable <u>automatic sizing</u> or

manually change the size of the boxes.   (See "Making Boxes Larger or Smaller.")

Spacing Between Boxes

Use consistent spacing throughout your chart.

The options in the Spacing dialog box ensure that the distances between boxes are consistent.   If you change the settings in this dialog box, change them for **all** boxes in your chart.   (See "Changing the Distance Between Boxes" for more information.)

Fonts/Sizes/Styles

If possible, limit yourself to one font and no more than three point sizes for all information in your chart.   Use larger point sizes toward the top of your chart and smaller ones toward the bottom.   Use text styles (boldface, italics, etc.) sparingly and consistently.   (See "Changing Text Styles.")

<u>Label</u> **Setups**

Arrange information the same way in each box.   If necessary, you can show less information the lower you go in your chart.   That also helps keep your chart as compact as possible.   (See "Changing the <u>Label Setup</u>.")

Group Styles

Use the same or similar group styles for groups with the same status.   Sequence boxes of equal status according to some impersonal rule, such as alphabetic order.   (See "Changing Group Styles.")

Chart Designs

If you create many charts for your company, use a chart <u>template</u> to ensure a consistent design.   (See "Creating a Chart Template.").   You could also use the Chart Styles command to help keep your charts consistent.   (See "Using Chart Styles.")   Use the same group styles for equivalent divisions or departments whenever possible.   Place titles and other annotations in the same place in each chart.

Label Your Chart Clearly

If you label and date your charts, you'll have a clear record of how the organization has changed over time.   People will more quickly understand what your charts actually show.

Most companies prefer to place the title in the top right or top center of the page.

If your chart shows a single unit of the total organization, the title should make clear the relationship of that unit to the rest of the company.   To do this, you might include the following:

• The name of the company

• The name of the main organizational group (e.g., Finance)

• The name of the organizational unit depicted in the chart (for instance, Accounting)

Date Your Chart

Since organization charts present a snapshot of the organization at a particular point in time, a date is very important.   Dates give the viewer a sense of the chart's currency, and suggest when updates are necessary.   Many companies include the date below or near the title; others place it in a corner of the chart.

Some companies also include authorization data − the name of the individual who authorized and approved the chart − as well as the name or initials of the person who made the chart.   This establishes authority and accountability, and helps control the creation and distribution of charts.   If you

would like to add a date manually, see "Annotating Your Chart."   If you would like Org Plus to add in dates for you automatically, see "Adding Dates Automatically."

Related topics

[Working with Multiple Charts](#)

[Making Your Chart More Compact](#)

[Making Boxes Larger and Smaller](#)

[Changing the Distance Between Boxes](#)

[Changing Text Styles](#)

[Changing the Label Setup](#)

[Changing Group Styles](#)

[Creating a Chart Template](#)

[Using Chart Styles](#)

[Annotating Your Chart](#)

[Automatic Date Annotations](#)

Time-saving Measures

The following topics describe some of the commands and techniques you can use to minimize the time it takes to create and update a <u>chart</u>.

Use Chart Templates and Chart Styles

If you create multiple charts for your organization, use chart templates or chart styles whenever possible.

When you use a chart <u>template</u>, you only have to create your company's basic chart once.   The chart template is like a pad of business forms.   When you open a chart as a template, you "tear off" a standard chart from the pad.   You then type in the information that is unique to your new chart, such as employee names, without having to redo the elements that are standard to all charts, such as the company's name or the formatting of the text.   This not only saves time, but ensures that your charts have a uniform appearance.   See "Creating a Chart Template" and "Using a Chart Template" for more information.

Chart styles are similar to chart templates in that they automatically formats all of the elements of the chart, including the text, boxes, and lines.   The main difference between chart templates and chart styles is that you can apply chart styles to charts that already exist, while chart templates must be used to start new charts from scratch.   See "Using Chart Styles" for more information.

Use Keyboard Shortcuts

Org Plus has many keyboard shortcuts for operations which otherwise must be done with the mouse. Many people find that it's faster to use the keyboard than the mouse.

Use the <u>Thumbnail</u>

One of the fastest ways to move around a large chart is to use the Thumbnail.   (Scrolling with the scroll bar is perhaps the slowest way!)   See "Using the Thumbnail" for instructions.

Hide Pictures

If you have placed pictures in the boxes of your chart, hide them until they are needed.   Each time you move through the chart, Org Plus has to redraw what's shown on screen, and drawing pictures takes time.

Minimize Formatting Time

Org Plus automatically calculates, formats, and draws the chart every time you change the number, size, or placement of boxes.   With most charts, such changes usually involve thousands of calculations and operations.   On slower machines such as a 286, this can take several seconds.   Use the methods described below to save time.

- Hide branches you don't need

- Hide branches that you aren't working with until you're ready to print.   Org Plus doesn't have to take the time to reformat hidden branches.

- Create multiple boxes at a time

   Org Plus reformats the chart every time you create a box.   It takes just as much time to reformat the chart for one new box as it does for multiple new boxes.

- Create boxes in Actual Size or in 200% of Actual

- Create boxes with the chart shown at Actual Size or 200% of Actual. Org Plus only redraws the visible portion of the chart, and these sizes display the smallest amount of the chart. The less that is visible, the faster the redrawing process.

Draw Annotations and Background Objects Last

Always create annotations as the last step before printing your chart: Imagine that your chart is drawn on a transparency, and that transparency is on top of a piece of paper that you can draw on. When you type text in any area **other than** the title areas and the boxes of the chart, you are typing onto this piece of paper beneath the transparency that contains your chart. If you modify your chart and Org Plus reformats it, the location of the annotation you type relative to the rest of the chart may be different, so you would have to move them. You can avoid this problem altogether if you always enter annotations **as the last step before printing your chart**. In addition, you can anchor background objects to boxes in your chart so that the object moves when the chart box move. See "Anchoring Background Text and Objects to Chart Boxes" for more information.

Use Pre-saved Table Specs and Batch Print Lists

When you create tables from the information in your chart, you must tell Org Plus which information to include in the table and in which order to sort it. If you create the same type of table on a regular basis, you can save time by saving a Table Spec for that type of table. Then, the next time you want to create that type of table, simply open the Table Spec and apply it to the current chart. For more information about Table Specs, see "Copying a Table to the Clipboard."

The same principle applies to Batch printing. When you Batch print a set of charts, you must tell Org Plus which group of charts to print. If you print the same group of charts on a regular basis, you can save time by saving that Chart List. Then, the next time you want to print that group of charts, simply open the Chart List. For more information about Chart Lists, see "Batch Printing."

Create Manually-drawn Objects Last

Imagine that your chart is drawn on a transparency, and that transparency is on top of a piece of paper that you can draw on. When you hand-draw objects with the special drawing tools, you draw them on the piece of paper beneath the transparency that contains your chart, not on the transparency itself. To the eye, there is only one drawing, but you really have two drawings: your chart, which is drawn automatically by Org Plus on a transparency, and a piece of paper beneath it containing your hand-drawn objects.

The two drawings are independent of each other. Org Plus moves the boxes in your chart as you create or delete them, but your hand-drawn objects stay where you draw them. Depending on how your chart changes, it is entirely possible that its boxes and lines may end up such that you have to move or redraw your hand-drawn objects.

For these reasons, we recommend the following:

- Always use the special drawing tools as the last step before printing your chart.
- Do not use the drawing tools to create the types of boxes and lines that Org Plus creates automatically. If you draw these objects manually, it is very likely that they will not stay connected to the rest of your chart.

Related topics

Creating a Chart Template

Using a Chart Template

Changing Your Chart Margins

Org Plus's default margins are set to a minimum to permit printing on as much of the page as possible. You should not need to change them, but if you do, here's how:

1. From the View menu, select Size to Window (ALT, V, S).

   This step is optional.   It allows you to see **all** the margins at the same time.

2. If the margin lines are hidden, from the View menu, select Show Page Lines (ALT, V, P).

3. Move your mouse pointer over one of the margin lines.

   There are four margin lines.   When you move the pointer over   these lines, the pointer changes to show you the direction in which you can drag.

4. Click and drag the margin line to move it, then release the mouse button.

   As you drag, Org Plus shows the actual width of the margin in the status bar at the bottom of the window.
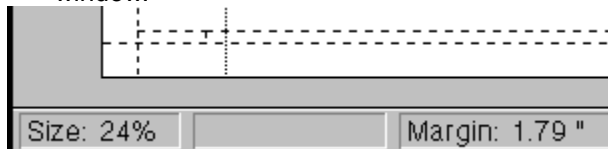
Laser printers cannot print within .25" (roughly) of any edge of the paper.   This is a limitation of the printer hardware, not of Org Plus.   That unprintable border determines the minimum margin for Org Plus charts.

Changing the Label Setup

The way labels are arranged in the boxes in your underline chart is called the underline label setup.   The label setup is like a blueprint for the location of information in each box.   You change the label setup to change the arrangement of information in your chart's boxes.

For example, to move the titles above the names in your chart, move the Title label above the Name label in the label setup.   Or, to move a picture above a name, move the Picture label above the Name label in the label setup.   You can change the label setup using the Label Setup dialog box.

Every box in your chart can have its own label setup, or all boxes can have the same label setup − it's up to you.   To save time, you can copy the label setup from one box to another with the Copy Setup command on the Edit menu (ALT, E, O).

For complete instructions about working with the label setup, see the topics listed below.

Related topics

Rearranging Information by Moving Labels

Showing/Hiding Information by Changing the Label Setup

Showing Hidden Information

Working with Dividing Lines

Changing Margins Within a Box

Copying the Label Setup

Rearranging Information by Moving Labels

You can rearrange the information in the boxes of your chart by moving labels in the label setup.   By rearranging labels, you can put information in any order in your chart.   You can also place information on the outside edges of boxes and create columns inside boxes.

To move a label:

1. Select the boxes containing the label setup you want to change.

   If you want to change the label setup for all boxes, press Ctrl+A.

2. From the Edit menu, select Label Setup (ALT, E, L).

   Org Plus displays the Label Setup dialog box.   It contains all the labels created for the chart.   The list on the left contains the labels that are not used in the label setup for the currently selected boxes.

3. Decide which label you want to move.

   You can move any label that appears in the Label Setup dialog box, including labels for pictures.

4. Decide where you want to move the label.

   You can move a label from the list on the left into the label setup, or from the label setup back into the list on the left.   You can also move a label into any outside corner of the label setup as well as inside it.   Finally, you can move a label next to, above, or below any label inside the label setup.

5. Drag the label where you want to put it.

   To move a label into an empty label area, drag it over the empty label area.   When the cursor changes to a bulls-eye, release the mouse button.
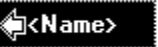
   To move a label to the left of an existing label, drag it over the left edge of the existing label.   When a left pointing arrow appears, release the mouse button.

   To move a label to the right of an existing label, drag it over the right edge of the existing label. When a right pointing arrow appears, release the mouse button.

   To move a label above an existing label, drag it over the top center of the existing label.   When an up pointing arrow appears, release the mouse button.
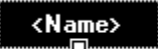
   To move a label below an existing label, drag it over the bottom center of the existing label.   When a down pointing arrow appears, release the mouse button.

6. Click OK to close the dialog box.

   Org Plus rearranges the information in the selected boxes to match the label setup.

Related topics

<u>An Example</u>

An Example

Suppose your <u>chart</u> shows names above titles. To move the titles above the names in your chart:

1. Press Ctrl+A to select all the boxes in your chart.

2. From the Edit menu, select <u>Label Setup</u> (ALT, E, L).

3. Drag the Name label over the Title label until you see the down arrow, then release.

4. Click OK.

Presto! – Org Plus reverses the information in your chart.

Showing/Hiding Information by Changing the Label Setup

Sometimes you may want to hide certain information in your underline chart from some people and show it to other people.   For example, you might want to print a chart for employees that **does not** show salary information, and a chart for the President that **does** show salary information.

To show or hide information in your chart:

1. Select the box(es) containing the information you want to show or hide.

   See "Selecting Boxes and Lines" for information about selecting boxes.

2. From the Edit menu, select Label Setup (ALT, E, L).

   Org Plus displays the Label Setup dialog box.

3. To hide information, click a label in the label setup and drag it into the list on the left.   To show hidden information, reverse the process.   Simply click a label in the list on the left and drag it into the label setup.

4. Click OK to close the dialog box.

   Org Plus asks to which boxes you want to apply your changes and then redraws your chart.

Related topics

Selecting Boxes and Lines

Showing Hidden Information

When you have hidden information in your <u>chart</u>, you sometimes need to see and edit it without changing the <u>label setup</u> for each box in your chart.   To do this, choose Show Hidden Labels from the View menu (ALT, V, H).   Org Plus adds the hidden information to the bottom of each box in the chart.   A check mark appears next to this command when hidden information is visible in your chart.   When you are finished editing the hidden information, choose Show Hidden Labels a second time to hide the information again.

Working with Dividing Lines

You can draw horizontal and vertical dividing lines within a box to separate information.   The figure below shows a box with a horizontal dividing line between the name and the title.

Chris Phillips
President & CEO

Related topics

Adding Dividing Lines

Removing Dividing Lines

Adding Dividing Lines

To add dividing lines to boxes:

1. Select the boxes to which you want to add dividing lines.

2. From the Edit menu, select <u>Label Setup</u> (ALT, E, L).

3. Click the button for the type of dividing line you want to create.

Notice that the lines drawn by the second and fourth "Lines" buttons touch the edges of the <u>chart</u>'s boxes.   Lines drawn by the first and third "Lines" buttons leave space between the end of the line and the edges of the chart's boxes.

4. Click inside the label setup at the location where you want to place the dividing line.

To create horizontal dividing lines, you must have at least two rows of label areas inside the box.   To create vertical dividing lines, you must have at least two columns of label areas that go from top to bottom inside the box.   You cannot draw dividing lines outside the label setup.

5. Click OK to close the dialog box.

Org Plus asks to which boxes you want to apply your changes and then redraws your chart.

Removing Dividing Lines

To remove dividing lines from boxes:

1. Select the boxes from which you want to remove dividing lines.
2. From the Edit menu, select <u>Label Setup</u> (ALT, E, L).
3. Click the button for the type of dividing line you want to remove.
4. Click the dividing line where it appears in the label setup.
5. Click OK to close the dialog box.

   Org Plus asks to which boxes you want to apply your changes and then redraws your <u>chart</u>.

Changing Margins Within a Box

Box margins are the amount of space between the box border and the labels within the box.   You can change top, bottom, left, and right margins.   The margins are preset to .05".

To change box margins:

1. Select the boxes in which you want to change the margins.

2. From the Edit menu, select <u>Label Setup</u> (ALT, E, L).

3. In the label setup diagram, position your pointer over the edge that you want to move.

   A special pointer appears automatically, as shown below.
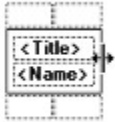
4. Drag the edge of the box left or right, up or down.

   When you release the mouse button, the margin will be set.

5. Click OK to close the dialog box.

   Org Plus asks to which boxes you want to apply your changes and then redraws your <u>chart</u>.

Copying the Label Setup

You can copy the <u>label setup</u> from one box to any other box.   When you copy the label setup, you copy the following: the arrangement of the labels, the text font, style, size, and color, and any box formatting, such as the border, shadow, and box background color.

To copy the label setup:

1. Select the box containing the setup you want to copy.

2. From the Edit menu, select Copy Setup (ALT, E, O).

3. Select the box(es) to which you want to apply the same setup.

4. From the Edit menu, select Paste Setup (ALT, E, P).

   Org Plus pastes the box setup onto the selected boxes.

Rearranging Boxes Within Their Groups

All boxes belong to a <u>group</u>.   A group consists of all the boxes having the same <u>manager</u>, excluding <u>assistant</u> boxes.   A <u>chart</u> is usually made up of many groups.

To rearrange a group of boxes, select the group you want to rearrange and from the Styles menu, choose a <u>group style</u>.   You can also create and rearrange subgroups and assistants.   For more complete instructions, see the topics listed below.

Related topics

<u>Changing Boxes from Assistants to Non-assistants</u>

<u>Changing Group Styles</u>

<u>Creating Subgroups</u>

<u>Changing Subgroup Styles</u>

<u>Merging Subgroups</u>

<u>Changing Assistant Styles</u>

<u>Creating Co-managers</u>

<u>Sorting Boxes</u>

Changing Boxes from Assistants to Non-assistants

To convert a box from one type to another, you can drag it from its current location and reattach it to another box in your chart as a **co-worker before** (above or to the left), **co-worker after** (below or to the right), or subordinate.   For example, if you have an assistant and you want that assistant to become a regular co-worker of some other employees, drag the assistant box over a non-assistant box so that it becomes a co-worker to that non-assistant box.   For more information, see "Moving Boxes in Your Chart."

Related topics

Moving Boxes in Your Chart

Changing Group Styles

You can arrange groups in 20 different ways, called group **styles**. Every group in a chart can have its own style.

To change the style for any group in your chart:

1. Double-click any box in the group to select the group.

   You can also select a group by clicking one box in the group and pressing Ctrl+G.

2. From the Styles menu, select a group style.

   Org Plus reformats your chart automatically when you select a new group style.

Creating Subgroups

A subgroup is a grouping of boxes within a larger group.   In the figure below, boxes a, b, and c are in one subgroup, and d, e, and f are in a separate subgroup.
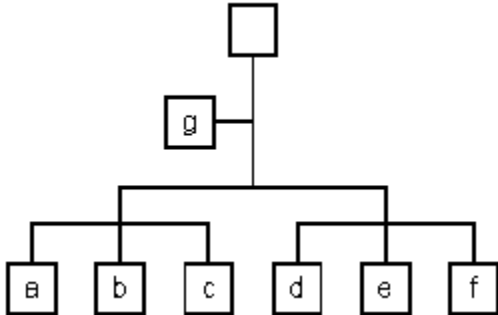
The boxes in both **subgroups** belong to the same **group** because they have the same manager. Subgroups can also have their own group styles.

To create a subgroup:

1. Select all the boxes that you want to designate as a subgroup.

   Boxes must be next to each other before you can make them into a subgroup.   They must also have the same manager.   See "Moving Boxes in Your Chart," for instructions.

2. Choose a group style from the Styles menu.

   Org Plus applies the style to the group.

Related topics

Moving Boxes in Your Chart

Changing Subgroup Styles

You change a <u>subgroup</u>'s style in the same way you change the style for a regular <u>group</u>:

1. Double-click any box in the subgroup to select the subgroup.

2. From the Styles menu, select a <u>group style</u>.

Merging Subgroups

Some time after dividing a <u>group</u> into subgroups, you may want to merge the subgroups back into a single group.

To merge subgroups into a single group:

1. Select all the boxes in all the subgroups that you want to merge.

2. From the Styles menu, select a <u>group style</u>.

If the subgroups have different managers, you must move the subgroups under the same <u>manager</u>.   To put boxes from different groups or subgroups into a single group, see "Gathering Scattered Boxes under a Single Manager."

Related topics

<u>Gathering Scattered Boxes under a Single Manager</u>

Changing Assistant Styles

An <u>assistant</u> provides administrative assistance, advice, or even managerial assistance to its <u>manager</u>. Org Plus provides eight different ways for you to represent the role of an assistant, all of which are available in the Styles menu.   In the figure below, the box labeled "g" is an assistant box.

The first three styles on the top row are often used to show assistants, such as secretaries, who provide administrative support.
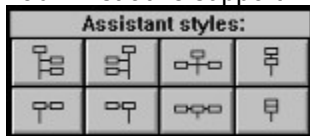
The first three styles on the bottom row are often used to show assistants, such as advisors or consultants, who are not necessarily <u>subordinate</u> to the individual.   You can also use these styles to show a board of directors.

The two styles at the far right are often used for assistants who assume managerial responsibility in the absence of the manager.

The preset <u>assistant style</u> is the first style in the top row.   When you create an assistant using the Assistant box tool, it is automatically given the preset style for assistants.   To change the preset style, click in the background of the <u>chart</u>, then from the Styles menu, choose the assistant style you want. See "Changing Options for New Charts."

To change an assistant's style:

1. Select the assistant whose style you want to change.

2. From the Styles menu, select the desired assistant style.

    When you apply an assistant style to a non-assistant box, the box is converted to an assistant.

Related topics

<u>Changing Options for New Charts</u>

Creating Co-managers

Co-managers are boxes that share responsibility for the same group of subordinate boxes.

To show that two or more boxes are co-managers:

1. Select the boxes that should be co-managers.

   Co-managers must be next to each other before you can give them the co-manager style.   They must also have the same manager.   See "Moving Boxes in Your Chart" for more information.

2. From the Styles menu, choose the co-manager style.
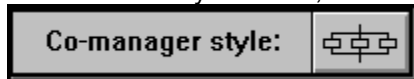
Related topics

Moving Boxes in Your Chart

Sorting Boxes

Using the Sort command, you can rearrange the boxes within a group.   You specify by which field(s) to sort the boxes and in what order they should be sorted.   Org Plus rearranges the boxes in their group(s) accordingly.   When boxes are sorted, they always remain in the same group.   Org Plus will not move boxes between groups in a sort operation.   In addition, hidden boxes are not included in Sort operations.   They always remain in their original locations.

To sort boxes in your chart:

1. Select the boxes in the group(s) that you want to sort.

   If you want to sort **all** of the boxes in a group, make sure to select **all** of the boxes in that group.   If you only want to sort **some** of the boxes in a group, select **only** those boxes.   However, those boxes must be next to each other in the group.   (It is acceptable for the boxes that you select to be separated by hidden boxes.)

   If you want to sort boxes in several groups, select boxes in each of the groups.   You must select more than one box in each of the groups.   Remember, when you sort the boxes that are currently in multiple groups, the boxes will remain in their groups.   They will not be sorted together.

2. From the Boxes menu, select Sort (ALT, B, T).

   Org Plus displays the Sort dialog box.

3. Select the sorting order for your boxes.

   - **Sort first by\Label name** − Click in this drop-down list to select the field by which your boxes will be sorted.   For example, if your boxes included the fields "Name" and "Salary" and you wanted to sort the group alphabetically by people's names, you would select the "Name" field from this drop-down list.

   - **Sort first by\Sort order** − Click in this drop-down list to select a sorting order.   Your choices are "Ascending" and "Descending."

     When you sort by fields that contain text and choose "Ascending" as your sorting order, boxes with an empty field will sort to the front.   When you choose "Descending" as your sorting order, boxes with an empty field will sort to the back.

     When you sort by fields that contain numbers, boxes with an empty field are sorted between boxes whose field has a negative value and boxes whose label has a non-negative value.

   - **Then by\Label name** − Click in this drop-down list to select a tie-breaking field.   For example, if you were sorting by "Name," but you had two individuals with the same name, you could choose "Salary" as the tie-breaking field.

   - **Then by\Sort order** − Click in this drop-down list to select a sorting order for the tie-breaking field. Again, your choices are "Ascending" and "Descending."

   - **Then by\Label name** − Click in this drop-down list to select a second "tie-breaking" field.

   - **Then by\Sort order** − Click in this drop-down list to select a sorting order for the second tie-breaking field.

4. Click OK.

   Org Plus sorts the boxes in the selected groups.   If you later add new boxes to a group, you will want

to sort the boxes in that group again.

Moving Boxes in Your Chart

To move boxes, you first select them and then either drag them or cut and paste them.   For information about selecting boxes, see "Selecting Boxes and Lines."   For more complete instructions about moving boxes, see the topics listed below.

Related topics

Selecting Boxes and Lines

Moving Boxes by Selecting and Dragging

Moving Boxes by Cutting and Pasting

Gathering Scattered Boxes Under a Single Manager

Centering a Manager over Its Group of Subordinates

Moving Boxes by Selecting and Dragging

You can move boxes in your chart simply by dragging them from one place to another with the arrow pointer.   You must drag a box **over** the box that will be its new co-worker or manager:

1. If your mouse pointer does not appear as an arrow, click the Selection Arrow tool located in the top left corner of the window.

2. Decide which box will be the new co-worker or manager of the box you are moving.

3. Drag the box you want to move over its new co-worker or manager.   Do not release the mouse button until the arrow points to where you want the box moved.
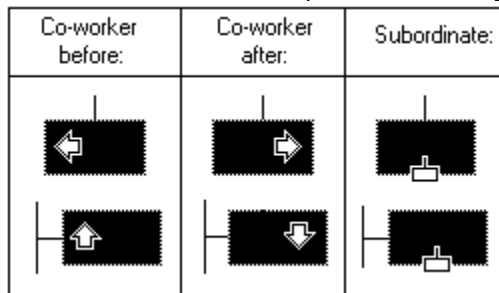
You must attach it to another box in your chart.   If you try to drop it next to, instead of over, another box, Org Plus will not know whether you want it to be a co-worker or subordinate of the box you drop it next to.   If necessary, Org Plus scrolls the window automatically as you drag.

If you want to move the box you have selected, but not its subordinates, simply press and hold the Ctrl key while you click and drag.

The first column in the figure above shows how you can place the box to the left of or above the highlighted box.   Just drag the box over the top left area of another box and arrows will appear, indicating where Org Plus will place the box when you release the mouse button.

The second column in the figure above shows how you can place the box to the right of or below the highlighted box.   Just drag the box over the top right area of another box and arrows will appear, indicating where Org Plus will place the box when you release the mouse button.

The third column in the figure above shows how you can attach the box as a subordinate to the highlighted box.   Just drag the box over the bottom area of another box and box symbols will appear. These symbols indicate where Org Plus will place the box when you release the mouse button.

4. Release the mouse button.

Org Plus moves the box or boxes and reformats your chart automatically.

If you make a mistake or do not like the result and want to undo the move, from the Edit menu, **immediately** select Undo (ALT, E, U).

Moving Boxes by Cutting and Pasting

To move box(es) by cutting and pasting:

1. Select the box(es) you want to move.

2. From the Edit menu, select Cut (ALT, E, T).

3. Click the box that you want to be the <u>manager</u> of the boxes you are moving.

4. From the Edit menu, select Paste (ALT, E, P).

   Org Plus pastes the boxes in their new location.

Gathering Scattered Boxes Under a Single Manager

You can cut and paste to move boxes from one place in your <u>chart</u> to another.   This is the most convenient way to gather selected boxes from scattered locations under a single <u>manager</u>.   You can also use this technique to cut or copy boxes from one chart to another.   See "Cutting and Pasting Between Charts."

Follow these basic steps:

1. If your mouse pointer does not appear as an arrow, click the Selection Arrow tool located in the top left corner of the window.

2. Select the box(es) you want to move.

   To select multiple boxes, either hold down the Shift key and click the boxes.   Alternatively, you can drag an outline around the boxes you want to select, provided the boxes are next to each other in the chart.   See "Selecting Boxes and Lines."

3. From the Edit menu, select Cut (ALT, E, T).

   The subordinates of cut boxes are automatically promoted a <u>level</u>.   This may cause your chart to look quite different when the operation is finished!   If you want to move a box without promoting its subordinates, drag the box while you press and hold the Ctrl key.

4. Decide where you want to paste the selected box or boxes.

   You can make them subordinates of any box in this or any other chart.

5. Select their new manager's box.

6. From the Edit menu, select Paste (ALT, E, P).

   The boxes are pasted as subordinates of the selected box.

Related topics

<u>Cutting and Pasting Between Charts</u>
<u>Selecting Boxes and Lines</u>

Centering a Manager over Its Group of Subordinates

When a manager's subordinates are arranged horizontally, you can center the manager over the subordinates by dragging the leftmost subordinate:

1. Move the cursor over the box of the leftmost subordinate in the level below the manager, press and hold Shift, then click and hold the mouse button.

   The cursor changes to a crosshair with arrowheads and a dotted-line box appears.

2. Drag the box right or left until it is positioned where you want it.

3. Release the mouse button.

   Org Plus re-positions the boxes in your chart.

4. Release the Shift key.

Changing the Distance Between Boxes

You can change the distance between boxes in all or selected groups using the Spacing dialog box. You can also change the distance between boxes in horizontally arranged groups by dragging individual boxes left or right.

Related topics

Using the Spacing Dialog Box

Changing the Length of Connecting Lines

Changing Distances by Dragging

Using the Spacing Dialog Box

The Spacing dialog box lets you change the distance between the boxes in all or selected groups in a single operation.   You can change the following:

• The distance between boxes in some or all groups

• The distance between some or all groups and their managers

• The distance between all groups in your <u>chart</u>

If you want to change the distance between two individual boxes in a <u>group</u>, see "Changing Distances by Dragging."

To use the Spacing dialog box:

1. Select the group(s) whose spacing you want to change.

   The easiest way to select a group is to double-click any box in the group.   Alternatively, you can select one box in the group and then press Ctrl+G.

Note: If you do not select any groups, Org Plus assumes you want to change the spacing between boxes in all groups in your chart.

2. From the Boxes menu, select Spacing (ALT, B, S).

   Org Plus displays the Spacing dialog box.

3. Type the desired distances in the fields of the dialog box.

   If your computer screen is large enough, you can move the dialog box to see your chart.

4. Click OK.

   Org Plus automatically adjusts the spacing as requested.

Related topics

<u>Changing Distances by Dragging</u>

Changing the Length of Connecting Lines

When you change the spacing between boxes as described in "Changing Distances by Dragging" or "Using the Spacing Dialog Box," Org Plus automatically lengthens or shortens the affected connecting lines.   You do not need to change the length of the lines manually.

Related topics

Using the Spacing Dialog Box

Changing Distances by Dragging

Changing Distances by Dragging

You can change the distance between any group and its manager by holding down the Shift key while you drag any box in the group up or down.   This technique normally is used to make a chart more compact.   See "Drag Groups Down," for more information.

You can also change the distance between boxes in horizontally arranged groups by holding down the Shift key and dragging individual boxes left or right.   A dotted rectangle surrounds the box(es) that will be moved.

When you release the mouse button, Org Plus redraws the boxes in their new location.   Do not worry about boxes overlapping − Org Plus will reformat everything for you.

Related topics

Drag Groups Down

Making Boxes Larger or Smaller

Org Plus automatically makes all boxes at the same <u>level</u> the same width and height.   No box is wider than its <u>manager</u>'s box.   This is called <u>automatic sizing</u>.

In general, automatic sizing ensures a nice balance between uniform box sizes and compactness.   Boxes toward the top of the <u>chart</u> tend to be less numerous and wider.   Boxes toward the bottom are more numerous and narrower.   If necessary, however, you can make any box in your chart virtually any size.   For instructions, see the topics listed below.

Related topics

<u>Making Boxes as Narrow as Possible</u>

<u>Making Boxes as Short as Possible</u>

<u>Making Boxes as Small as Possible</u>

<u>Giving a Box a Fixed Size</u>

<u>Restoring Automatic Sizing</u>

Making Boxes as Narrow as Possible

To make a box as narrow as possible, select the box.   Then, from the Boxes menu, deselect the Auto Width command (ALT, B, D).

If the box does not get narrower, then it is already the preset minimum width (.125").   In this case, from the Boxes menu, select Manual Size (ALT, B, M), and enter a narrower width.   See "Giving a Box a Fixed Size."

Related topics

Giving a Box a Fixed Size

Making Boxes as Short as Possible

To make a box as short as possible, select the box.   Then, from the Boxes menu, deselect the Auto Height command (ALT, B, H).

If the box does not get shorter, then it is already the preset minimum height (.07").   In this case, from the Boxes menu, select Manual Size (ALT, B, M), and enter a smaller height. See "Giving a Box a Fixed Size."

Related topics

Giving a Box a Fixed Size

Making Boxes as Small as Possible

To make a box as small as possible, select the box.   Then, from the Boxes menu, deselect both the Auto Width and Auto Height commands (ALT, B, D), (ALT, B, H).

If the box does not get smaller, then it is already the preset minimum size (.125" wide by .07" high).   In this case, from the Boxes menu, select Manual Size (ALT, B, M), and enter a smaller width and height. See "Giving a Box a Fixed Size."

Related topics

Giving a Box a Fixed Size

Giving a Box a Fixed Size

You can make a box whatever size you want.   However, Org Plus does not let you make the box smaller than the size needed to show its information.   If you add more information to the box, it may grow larger than the size you specify in the Manual Size dialog box.

To give a box a fixed size:

1. Select the box or boxes with the size you want to set manually.

2. From the Boxes menu, select Manual Size (ALT, B, M).

   Org Plus displays the Manual Size dialog box.

3. Type the height and width you want for the selected boxes.

   The minimum allowable width is .125".   The minimum allowable height is .07".   The maximum box size is 110" by 110".

4. Click OK.

   Org Plus makes your boxes the size you specified.

Restoring Automatic Sizing

To restore <u>automatic sizing</u> to boxes from which it has been removed:

1. Select the boxes for which you want to restore the automatic sizing.

2. From the Boxes menu, select both Auto Width and Auto Height (ALT, B, D), (ALT, B, H).

   There should be a check mark in front of each command when you are done.

Changing Text Styles

You can change the appearance of any text in your <u>chart</u>.   For instructions, see the topics listed below.

Related topics

<u>Changing Text Fonts, Styles, Sizes, and Colors</u>

<u>Changing Text Shadows</u>

<u>Wrapping Text Across Lines</u>

<u>Changing People's Name Formats</u>

<u>Changing Text Alignment</u>

<u>Moving Text</u>

<u>Using the Set Text Command</u>

<u>Displaying Labels in Your Chart</u>

Changing Text Fonts, Styles, Sizes, and Colors

To change a text font, style, size, or color:

1. Select the text whose font, style, size, or color you want to change.

2. From the Text menu, select Font (ALT, T, F), Style (ALT, T, Y), Size (ALT, T, S), or Color (ALT, T, O), and then make a selection from the submenu or dialog box that Org Plus displays.

You can save time if you first select **all** the text you want to change − everywhere in your <u>chart</u> − **then** select a font, style, size, or color:

- To select all the text in a box, click the box once.

- To select all the text in multiple boxes, Shift-click the boxes or drag an outline around them.   With this method, you can only change **all** of the text in the boxes, not just selected fields in the boxes.

To change the font, size, style, or color of some but not all information in multiple boxes, see "Using the Set Text Command."

Note: Org Plus gives you the option of selecting from over 70 colors for the elements in your chart. However, if you have a 16-color monitor, some of these colors cannot be displayed on your monitor. For chart boxes and the chart background, Org Plus will simulate these colors with patterns created by other colors.   For lines, text, shadows, box borders, and chart borders, Org Plus will pick the nearest displayable color.   However, these colors will always print correctly.

Related topics
<u>Using the Set Text Command</u>

Changing Text Shadows

Shadows provide another way for you to enhance the text in your <u>chart</u>.   You can control the color, style, and offset of the shadow of your text.

To change a text shadow:

1. Select the text whose shadow you want to change.

2. From the Text menu, select Shadow (ALT, T, H).

    Org Plus displays the Text Shadow dialog box.   This is where you select formatting options for the text shadow.

3. Select the options that you want for your text shadow.

    Style − Click the button for the style of shadow that you want.   Click the top button to remove all shadowing from the selected text.
    The second and third shadow styles share one default **shadow setup**, and the fourth and fifth shadow styles share a different default shadow setup.   A shadow setup includes the offset and color. When you first use Org Plus, each of the shadow styles appears with their default shadow setup. You can then change a style's shadow setup in any way you like.   Org Plus remembers the changes that you make to a shadow setup, and applies the changes to all of the shadow styles that share the same shadow setup.   This way, any time you choose a shadow style, it has the shadow setup you used most recently.

    Color − Use these color palettes to select shadow and highlight colors for text.   Highlight colors are only available for the bottom two shadow styles.   Do not choose a shadow or highlight color that is the same color as your chart's background.   If you do, the shadow or highlight will not be visible.

    Offset − These items control the placement of the shadow in relation to the text.   Enter larger numbers into the two drop-down fields to move the shadow further away from the text; enter smaller numbers to bring the shadow closer.   In general, smaller numbers make a more attractive shadow. Click either the "Right" or "Left" option button and either the "Up" or "Down" option button to choose the direction in which the shadow moves away from the text.

    Default − The shadow styles have default shadow setups.   The defaults are a basic setup with muted colors and a small offset.   Click "Default" if you want a basic setup for the shadow style that is currently selected.   Other shadow styles that share the same shadow setup will also revert to the default.
    Org Plus displays a sample of your choices, including the background color, in the Sample box.

4. Click OK to close the dialog box.

Org Plus adds the shadow to your chart.

Note: Org Plus gives you the option of selecting from over 70 colors for the elements in your chart. However, if you have a 16-color monitor, some of these colors cannot be displayed on your monitor. For chart boxes and the chart background, Org Plus will simulate these colors with patterns created by other colors.   For lines, text, shadows, box borders, and chart borders, Org Plus will pick the nearest displayable color.   However, these colors will always print correctly.

Wrapping Text Across Lines

Most information in your <u>chart</u>, such as names or titles, is usually kept together on a single line.   Some information, such as a job description or a long comment, may look better if **wrapped** − or split − across multiple lines, as shown below.

```
┌─────────────────────────────────────┐
│              President               │
└─────────────────────────────────────┘
                   │
                   │
┌─────────────────────────────────────┐
│     V.P. Research and Development    │
│         Responsible for all R&D      │
│       activities, including planning,│
│         design, and programming.     │
└─────────────────────────────────────┘
```
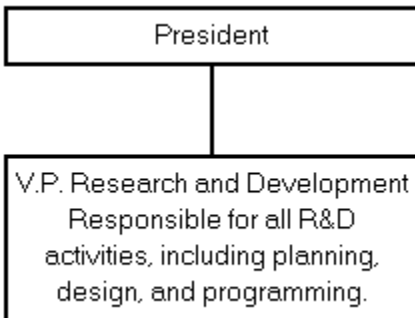
To wrap text:

1. Select the text you want to wrap.

2. From the Text menu, select Word Wrap (ALT, T, W).

You can save time if you first select **all** the text items you want to wrap − everywhere in your chart − **then** wrap them:

- To wrap all the text in a box, click the box once.

- To wrap all the text in multiple boxes, Shift-click the boxes or drag an outline around them.   With this method, you can only wrap **all** of the text in the boxes, not just selected labels in the boxes.

To wrap some but not all information in multiple boxes, see "Using the Set Text Command."

Related topics
<u>Using the Set Text Command</u>

Changing People's Name Formats

To change the way people's names are formatted in your <u>chart</u>:

1. Select the boxes whose name formatting you want to change.

   If you want to change all names in your chart, press Ctrl+A to select all the boxes.

2. From Text menu, select Name (ALT, T, N), and then select a name format.

If you have multiple names in multiple boxes and want to change the format of some of the names − but not all − use the Set Text command.

Related topics

<u>Using the Set Text Command</u>

Changing Text Alignment

To change the alignment of text:

1. Select the text whose alignment you want to change.

2. From the Text menu, select Left (ALT, T, L), Right (ALT, T, R), or Center (ALT, T, C).

You can save time if you first select **all** the text you want to change – everywhere in your <u>chart</u> – **then** select Left, Right, or Center:

- To select all the text in a box, click the box once.

- To select all the text in multiple boxes, Shift-click the boxes or drag an outline around them.   With this method, you can only change **all** of the text in the boxes, not just selected fields in the boxes.

To change the alignment of some but not all information in multiple boxes, see "Using the Set Text Command."

Related topics

<u>Using the Set Text Command</u>

Moving Text

You can move text in boxes by moving labels in the <u>Label Setup</u> dialog box.   See "Rearranging Information by Moving Labels" for more information.

Related topics

<u>Rearranging Information by Moving Labels</u>

Using the Set Text Command

You can use the Set Text command to change the characteristics of selected information in selected boxes of your <u>chart</u>.   For example, you could use the Set Text dialog box to make all the titles in your chart bold and italic.

You could get the same result by manually selecting and changing each title, but by using the Set Text command, you can accomplish this formatting much more quickly.

To use the Set Text command:

1. Select the boxes containing information you want to change.

2. From the Text menu, select Set Text (ALT, T, T).

   Org Plus displays the Set Text dialog box.

   The list on the left shows the labels that have been created for your chart.   The controls on the right show the settings for the currently selected <u>label</u>.

3. Click the label whose settings you want to change.

   For example, to change the style of your chart's title, click the Title label.

4. Select the check box for the text attributes you want to change.

   For example, to make titles bold and italic, select the "Style" check box.   If you do not select the check boxes for the attributes you want to change, your changes will **not** take effect.

5. Make the appropriate choices from the drop-down lists and option buttons on the right.

   - **Font** – Click this drop-down list to select a font for your text.
   - **Size** – Click this drop-down list to select a point size for your text.
   - **Style** – Click this drop-down list to select a style, such as bold or italic, for your text.
   - **Color** – Click this drop-down list to select a color for your text.
   - **Shadow** – Select "On" to display the Text Shadow dialog box and select a shadow style; select "Off" to remove any current shadowing from the text.
   - **Names** – Click this drop-down list to select a name format for the names in your chart.
   - **Alignment** – Click this drop-down list to make an alignment selection, such as center or left, for your text.
   - **Word Wrap** – Select "On" to wrap your text; select "Off" to unwrap it.
   - **Show Label** – Select "On" to display the label for your text; select "Off" to hide any labels.
   - **Underline** – Select "On" to underline your text; select "Off" to remove any underlining.

6. Repeat steps 3 through 5 for each label you want to change.

7. Click OK.

   Org Plus applies your changes to the selected information.

Note: Org Plus gives you the option of selecting from over 70 colors for the elements in your chart. However, if you have a 16-color monitor, some of these colors cannot be displayed on your monitor. For chart boxes and the chart background, Org Plus will simulate these colors with patterns created by

other colors.   For lines, text, shadows, box borders, and chart borders, Org Plus will pick the nearest displayable color.   However, these colors will always print correctly.

_____

Displaying Labels in Your Chart

When you click twice on an empty box in your <u>chart</u>, labels appear in the box to show you what to type.

```
Tom Jones
    25
```

Ordinarily, the labels disappear as soon as you have typed the information.

```
Tom Jones
Age: 25
```

In some cases, however, you may want to see the <u>label</u> along with the information.   You can tell Org Plus to show the label before the information, as shown in the figure to the left.

To display labels in a chart:

1. Select the boxes in which you want to display labels.

2. From the Text menu, select Set Text (ALT, T, T).

    Org Plus displays the Set Text dialog box.

3. In the Text values list, select the label you want to display.

4. Select the Show label check box and then select the On option button.

☐ **W̲ord wrap:**   ○ On   ◉ Off

☐ **Show l̲abel:**   ◉ On   ○ Off

☐ **U̲nderline**   ○ On   ◉ Off

:el   [OK   ]

Note: Showing labels in your chart may make your chart more clear to others, but it may make the boxes − and therefore the chart − wider as well.

Changing Box and Line Styles

There are several commands to help you enhance your boxes and lines.   For instructions, see the topics listed at the bottom of this screen.

The commands on the Boxes menu work with **all** boxes, whether they were created automatically using the box tools or were drawn manually with the drawing tools.   The commands on the Lines menu work with the <u>connecting lines</u> drawn automatically by Org Plus and any lines drawn manually with the drawing tools.   The Lines menu commands **do not** work with box borders.

Related topics

<u>Changing Box and Box Border Characteristics</u>

<u>Changing Box Shadows</u>

<u>Changing Line Thickness, Style, and Color</u>

<u>Changing Line Shadows</u>

Changing Box and Box Border Characteristics

You can choose from 12 box border styles, 3 border line styles, 70 or more box and box border colors, and 3 box shapes.

To change border styles, border line styles, box colors, border colors, and box shapes:

1. Select the box or boxes with the border style, border line style, color, border color, or shape you want to change.

2. From the Boxes menu, select either Border Style (ALT, B, B), Border Line Style (ALT, B, Y), Color (ALT, B, O), Border Color (ALT, B, L), or Shape (ALT, B, A).

3. Make your selection from the submenu or dialog box that Org Plus displays.

Note: A **hairline** border is the thinnest border your printer can draw.   It appears thicker on your computer screen than it will when it is printed.   When you make your selection, Org Plus reformats the selected boxes.

Special Information about Colors

Using the Color (ALT, B, O) command, you can give your <u>chart</u> boxes any of 69 different colors, plus "None" (transparent).   In addition, when you are working with a <u>client</u> application, up to 20 extra colors which match the color scheme in that application may be available, depending on that application's capabilities.

You can select transparent by clicking the color square in the lower right corner of the color palette. When you select transparent as the color for a <u>chart box</u>, the background of your chart will show through the box.   The background will also show through transparent chart boxes in client applications, but **only** when you link or embed the chart as an Org Plus Chart <u>Object</u> or as a Picture.   Thus, if you have a chart box colored transparent and you link the chart as an Org Plus Chart Object or as a Picture to a Microsoft PowerPoint® presentation that has a blue background, the chart boxes will appear to be blue.

If you have a 16-color monitor, some colors cannot be displayed on your monitor.   For chart boxes and the chart background, Org Plus will simulate these colors with patterns created by other colors.   For lines, text, shadows, box borders, and chart borders, Org Plus will pick the nearest displayable color. However, these colors will always print correctly.

Changing Box Shadows

Shadows provide another way for you to enhance the boxes in your <u>chart</u>.   You can control the color, style, and offset of the shadow on your boxes.

To change a box shadow:

1. Select the box whose shadow you want to change.

2. From the Box menu, select Shadow (ALT, B, W).

   Org Plus displays the Box Shadow dialog box.   This is where you select formatting options for the box shadow.

3. Select the options that you want for your box shadow.

   Style – Click the button for the style of shadow that you want.   Select the first style to remove all shadowing from the selected boxes.
   The second, third, fourth, and fifth shadow styles share one default shadow setup, the sixth, seventh, eighth, and ninth shadow styles share another default shadow setup, and the tenth shadow style has its own default shadow setup.   When you first use Org Plus, each of the shadow styles appears with its default shadow setup.   You can then change a style's shadow setup in any way you like.   Org Plus remembers the changes that you make to a shadow setup, and applies the changes to all of the shadow styles that share the same shadow setup.   This way, any time you choose a shadow style, it appears with the shadow setup that was most recently used.

   Color – Use these color palettes to select shadow and highlight colors for boxes.   Highlight colors are only available for the bottom two shadow styles.   Do not choose shadow and highlight colors that are the same color as your chart's background.   If you do, the shadow or highlight will not be visible.

   Offset – These items control the placement of the shadow in relation to the text.   Enter larger numbers into the two drop-down fields to move the shadow further away from the text; enter smaller

numbers to bring the shadow closer.   In general, smaller numbers make a more attractive shadow.   Click either the "Right" or "Left" option button and either the "Up" or "Down" option button to choose the direction in which the shadow moves away from the text.

Default − The shadow styles have default shadow setups.   The defaults are a basic setup with muted colors and a small offset.   Click "Default" if you want a basic setup for the shadow style that is currently selected.   Other shadow styles that share the same shadow setup will also revert to the default.

Org Plus displays a sample of your choices, including the background color, in the Sample box.

4. Click OK to close the dialog box.

Org Plus reformats the shadows of the selected boxes.

Note: Org Plus gives you the option of selecting from over 70 colors for the elements in your chart.   However, if you have a 16-color monitor, some of these colors cannot be displayed on your monitor.   For chart boxes and the chart background, Org Plus will simulate these colors with patterns created by other colors.   For lines, text, shadows, box borders, and chart borders, Org Plus will pick the nearest displayable color.   However, these colors will always print correctly.

Changing Line Thickness, Style, and Color

Connecting lines attach the boxes in your chart to each other.

To change the thickness, style, or color of connecting lines:

1. Select the lines with the thickness, style, or color you want to change.

2. From the Lines menu, select Thickness (ALT, L, T), Style (ALT, T, Y), or Color (ALT, L, L).

3. Make your selection from the submenu or dialog box that Org Plus displays.

   Org Plus reformats the lines of the selected boxes.

A **hairline** line is the thinnest line your printer can draw.   It appears thicker on your computer screen than it will when it is printed

Note: Org Plus gives you the option of selecting from over 70 colors for the elements in your chart. However, if you have a 16-color monitor, some of these colors cannot be displayed on your monitor. For chart boxes and the chart background, Org Plus will simulate these colors with patterns created by other colors.   For lines, text, shadows, box borders, and chart borders, Org Plus will pick the nearest displayable color.   However, these colors will always print correctly.

Changing Line Shadows

Shadows provide another way for you to enhance the lines in your chart.   You can control the color, style, and offset of the shadow on your lines.

To change a line shadow:

1. Select the line whose shadow you want to change.

2. From the Lines menu, select Shadow (ALT, L, W).

   Org Plus displays the Line Shadow dialog box.   This is where you select formatting options for the line shadow.

3. Select the options that you want for your line shadow.

    Style − Click the button for the style of shadow that you want.   Select the first style to remove all shadowing from the selected boxes.
Styles two and three have one default shadow setup, and styles four and five have another default shadow setup.   When you first use Org Plus, the styles will appear with their group defaults.   You can then change the shadow setup in any way you like.   Org Plus will remember your changes, so the next time you choose one of those styles, it will appear with the shadow setup most recently used in that group, instead of the default setup.

    Color − Use these color palettes to select shadow and highlight colors for your lines.   Highlight colors are only available for shadow styles that use two colors.   Do not choose shadow and highlight colors that are the same color as your chart's background.   If you do, the shadow or highlight will not be visible.

    Offset − These items control the placement of the shadow in relation to the lines.   Enter larger numbers into the two drop-down fields to move the shadow further away from the lines; enter smaller numbers to bring the shadow closer.   In general, smaller numbers make a more attractive shadow.

    Click either the "Right" or "Left" option button and either the "Up" or "Down" option button to choose the direction in which the shadow moves away from the lines.

    Default − Org Plus has a default shadow setup for each shadow style.   This default is a basic setup with muted colors and a small offset.   Click "Default" if you want a basic setup or if you have created a shadow setup that you don't like and want to go back to the basics.

    Org Plus displays a sample of your choices, including the background color, in the Sample box.

4. Click OK to close the dialog box.

Org Plus reformats the shadows of the selected lines.

Note: Org Plus gives you the option of selecting from over 70 colors for the elements in your chart. However, if you have a 16-color monitor, some of these colors cannot be displayed on your monitor. For chart boxes and the chart background, Org Plus will simulate these colors with patterns created by other colors.   For lines, text, shadows, box borders, and chart borders, Org Plus will pick the nearest displayable color.   However, these colors will always print correctly.

Changing Chart Styles

There are several commands to help you enhance your charts.   For instructions, see the topics listed below.

Related topics

[Changing Chart Border Characteristics](#)

[Changing Chart Border Shadows](#)

[Moving Your Entire Chart](#)

[Centering Your Entire Chart](#)

[Changing the Chart Background Color](#)

[Using Chart Styles](#)

Changing Chart Border Characteristics

When you want a border around your entire <u>chart</u>, it is important to use the Border commands on the Chart menu instead of drawing a box manually with the drawing tools.   Chart borders will resize automatically as your chart changes, but boxes drawn around charts manually will not.

You can choose from 12 chart border styles, 3 chart line styles, and 70 or more chart border colors.

To change chart border colors, border line styles, and border styles:

1. From the Chart menu, select either Border Color (ALT, B, L), Border Style (ALT, B, B), or Border Line Style (ALT, B, Y).

2. Make your selection from the submenu or dialog box that appears.

Note: A **hairline** border is the thinnest border your printer can draw.   It appears thicker on your computer screen than it will when it's printed. Org Plus reformats the chart border.

Note: Org Plus gives you the option of selecting from over 70 colors for the elements in your chart. However, if you have a 16-color monitor, some of these colors cannot be displayed on your monitor. For chart boxes and the chart background, Org Plus will simulate these colors with patterns created by other colors.   For lines, text, shadows, box borders, and chart borders, Org Plus will pick the nearest displayable color.   However, these colors will always print correctly.

Changing Chart Border Shadows

Shadows provide another way for you to enhance your <u>chart</u> border.   You can control the color, style, and offset of the shadow on your chart border.

To change a chart border shadow:

1. From the Chart menu, select Border Shadow (ALT, B, W).

   Org Plus displays the Border Shadow dialog box.   This is where you select formatting options for the border shadow.

2. Select the options that you want for your border shadow.

   Style − Click the button for the style of shadow that you want.   Select the first style to remove all shadowing from the border.
   Styles two through five have the same default shadow setup, styles six through nine have another default shadow setup, and style 10 has its own default shadow setup.   When you first use Org Plus, the styles will appear with their <u>group</u> defaults.   You can then change the shadow setup in any way you like.   Org Plus will remember your changes, so the next time you choose one of those styles, it will appear with the shadow setup most recently used in that group, instead of the default setup.

   Color − Use these color palettes to select shadow and highlight colors for your border.   Highlight colors are only available for the bottom five shadow styles.   Do not choose shadow and highlight colors that are the same color as your chart's background.   If you do, the shadow or highlight will not be visible.

   Offset − These items control the placement of the shadow in relation to the border.   Enter larger numbers into the two drop-down fields to move the shadow further away from the border; enter smaller numbers to bring the shadow closer.   In general, smaller numbers make a more attractive shadow.
   Click either the "Right" or "Left" option button and either the "Up" or "Down" option button to choose the direction in which the shadow moves away from the border.

   Default − Org Plus has a default shadow setup for each shadow style.   This default is a basic setup with muted colors and a small offset.   Click "Default" if you want a basic setup or if you have created a shadow setup that you don't like and want to go back to the basics.
   Org Plus displays a sample of your choices, including the background color, in the Sample box.

3. Click OK to close the dialog box.

   Org Plus reformats the chart shadow.

Note: Org Plus gives you the option of selecting from over 70 colors for the elements in your chart. However, if you have a 16-color monitor, some of these colors cannot be displayed on your monitor. For chart boxes and the chart background, Org Plus will simulate these colors with patterns created by other colors.   For lines, text, shadows, box borders, and chart borders, Org Plus will pick the nearest displayable color.   However, these colors will always print correctly.

Moving Your Entire Chart

You can move the entire <u>chart</u> anywhere on the page (or pages) just by dragging the <u>topmost box</u>.   This can be handy if you want to move your chart off center.

To move your entire chart:

1. From the View menu, select Size to Window (ALT, V, S).

   Now you can see your entire chart at once.

2. Move the cursor over the topmost box, and click and hold the mouse button.

   The cursor changes to a crosshair with arrowheads and a dotted-line box appears.

3. Drag the chart up, down, right, or left until it's positioned where you want it.

4. Release the mouse button.

   Org Plus re-positions your chart.

Centering Your Entire Chart

There are also menu commands for centering your <u>chart</u> on the page:

```
Chart
  Make Fit...          Ctrl+F

√ Center Up/Down
√ Center Left/Right

  Background Color          ▶
```
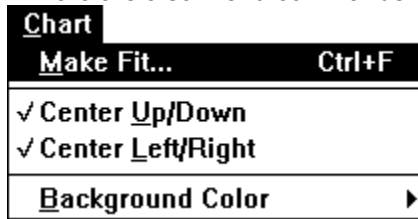
To center your chart horizontally between left and right margins, from the Chart menu, choose Center Left/Right (ALT, C, L).

To center your chart vertically between top and bottom margins, from the Chart menu, choose Center Up/Down (ALT, C, U).

Once you have selected either horizontal or vertical centering, your chart remains centered until you turn the centering off or move the <u>topmost box</u>.   To turn either type of centering off, choose the centering command a second time.

Changing the Chart Background Color

You can give your <u>chart</u> background any of 69 different colors, plus "None" (transparent) in some cases. In addition, when you are working with a <u>client</u> application, up to 20 extra colors which match the color scheme in that application may be available, depending on that application's capabilities

If you select transparent as the color for the chart background, the background will be transparent in client applications **only** when you link or embed the chart as an Org Plus Chart <u>Object</u> or as a Picture. Thus, if you have a chart background colored "None," and you link the chart as an Org Plus Chart Object or as a Picture to a Microsoft PowerPoint® presentation that has a blue background, the chart's background will appear to be blue.   You can select "None" by clicking the color square in the lower right corner of the color palette.

To select a color that fills the entire background area of your chart:

1. From the Chart menu, select Background Color (ALT, C, B).

   Org Plus displays the Background Color dialog box.

2. Select a color from the color palette.

3. Click OK.

   Org Plus changes the background color of your chart.

Note: Org Plus gives you the option of selecting from over 70 colors for the elements in your chart. However, if you have a 16-color monitor, some of these colors cannot be displayed on your monitor. For chart boxes and the chart background, Org Plus will simulate these colors with patterns created by other colors.   For lines, text, shadows, box borders, and chart borders, Org Plus will pick the nearest displayable color.   However, these colors will always print correctly.

Using Chart Styles

Org Plus has pre-made <u>chart</u> styles that you can apply to an entire existing chart or to selected boxes in an existing chart.   Using chart styles saves you the time that it would take to select text, box, line, and chart border styles and colors.   When you apply a chart style, Org Plus formats your chart all in one step, without affecting the information contained in your chart.

If your company has a standard style for charts, you can also create your own chart styles.   Then, it will be quick and easy to format any charts that you make in the future.

For instructions, see the topics listed below.

Related topics

<u>Applying Chart Styles</u>

<u>Creating a New Chart Style</u>

Applying Chart Styles

To apply a <u>chart</u> style to your chart or to selected boxes in the chart:

1. Select the boxes to which you want to apply the chart style.   If you do not select any boxes, Org Plus applies the style to the entire chart.

2. From the Chart menu, select Apply Style (ALT, C, A).

   Org Plus displays the Apply Style dialog box.

3. Using the Drives, Directories, and File Name fields, locate the chart style file that you want to apply.

   If you are not sure what a chart style looks like, just try it out.   If you do not like its appearance, from the Edit menu, select Undo **immediately** (ALT, E, U).   You can then try another chart style.

4. Click OK.

   Org Plus applies the chart style to your chart.   All of the information in your chart remains intact. The list below describes which elements of your chart will be affected.

   • Chart background color, border color, border style, border line style, and border shadow (these elements change only when you apply the style to the entire chart)

   • Box fill color, border color, border style, border line style, shadow, and shape

   • Connecting line color, style, thickness, and shadow

   • Box text font, size, style, color, and shadow

   • Title text font, size, style, color, and shadow

   • Manually-drawn lines inherit the shadow and color, but not the thickness or line style

   • Manually-drawn boxes inherit the shadow, fill color, and border color of chart boxes, but not the shape, border style, or border line style

   • Background text inherits the shadow and color of box text, but not the font, size, or style

Creating a New Chart Style

To create a new <u>chart</u> style:

1. Format a <u>chart box</u> just as you want the boxes in your new chart style formatted, including colors, text styles, border styles.   The chart box must have at least one <u>subordinate</u>.   (You can format an entire chart, if you like, instead of just a single box.)

   You should be aware of the following:

   - If there is more than one title on your chart, Org Plus takes the title text formatting from the first letter of the title in the top center of your chart.

   - All box text formatting is taken from the first letter in the first <u>label</u> in the box, not including labels that are on the outside edges of the box.

   - All connecting line formatting is taken from the connecting line that comes directly out of the bottom of the box.

2. Select the box that you formatted in step 1.   If you do not select a box, the chart style will be created from the <u>topmost box</u> in your chart.

3. From the Chart menu, select Save Style (ALT, C, V).

   Org Plus displays the Save Style dialog box.

4. Type a name for your chart style in the File Name field.

5. Click OK.

   Org Plus saves your chart style.   You can now apply it to any chart.

Making Your Chart Narrower

If your chart is too wide, use any of the following techniques to make it narrower.

Related topics

Use Vertical Group Styles

Offset Groups Beneath Their Manager

Drag Groups Down

Wrap Text

Abbreviate Names and Titles

Use Vertical Group Styles

In general, you get the most compact <u>chart</u> by using horizontal styles for groups at the top of your chart and vertical styles for groups at the bottom of your chart.

In the figure below the narrow <u>group</u> styles are highlighted.   The narrowest styles are the two list styles, located on the second row from the bottom.
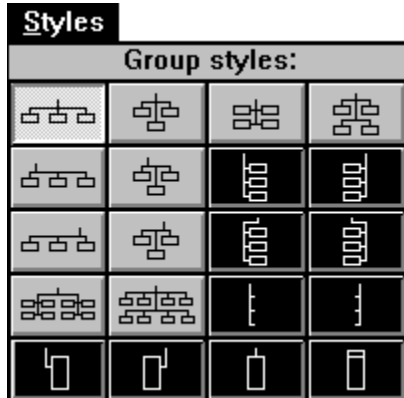
To change group styles:

1. Select the group whose style you want to change.

2. From the Styles menu, select a <u>group style</u>.

    Org Plus reformats the group of boxes.

Start with groups at the bottom of your chart and work your way up, using the narrowest vertical styles at the bottom, and wider, horizontal ones at the top.   See "Changing Group Styles" for more information.

Related topics

<u>Changing Group Styles</u>

Offset Groups Beneath Their Manager

In some cases, you can save space by shifting a horizontally arranged group of subordinates so that they are tucked underneath their manager instead of off to the side.   The four styles highlighted in the figure below show the offsetting group styles.
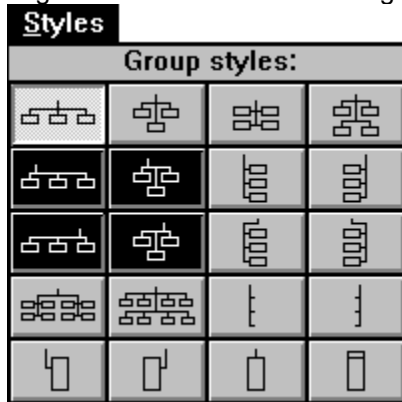
To change the offset of a horizontal group beneath its manager:

1. Double-click any box in the group that you want to offset.

2. From the Styles menu, select the appropriate style.

   Org Plus reformats the group of boxes.

Drag Groups Down

You can sometimes make a dramatic difference in the width of your <u>chart</u> if you increase the distance between a <u>group</u> and its <u>manager</u>.   Of course, this makes your chart taller, too.   (Please note that you cannot drag a group of <u>assistant</u> boxes.)
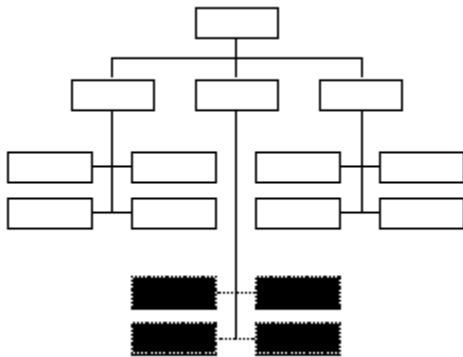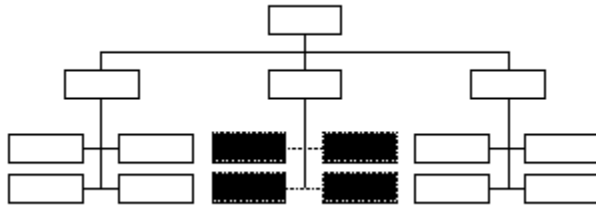
In the bottom chart, the highlighted groups have been dragged down to create a more compact chart.

To increase the distance between a group and its manager:

1. Press and hold the Shift key while you drag any member of the group downwards.

2. Release the mouse button to see the effect of the move.

    Org Plus reformats the group of boxes.

3. Repeat steps 1 and 2 as many times as desired in order to get the maximum compactness.

This technique can make your chart more compact, but it also makes the reporting relationships somewhat harder to see and can give a misleading sense of status.

Wrap Text

Long text items, such as job descriptions, will make your <u>chart</u> very wide.   You can make your chart narrower by <u>wrapping</u> extra-wide text values across multiple lines.

For information about wrapping text, see "Wrapping Text across Lines" and "Using the Make Fit Command."

Related topics

<u>Wrapping Text across Lines</u>

<u>Using the Make Fit Command</u>

Abbreviate Names and Titles

Abbreviate all information that does not need to be spelled out.   This can significantly reduce the width of your chart.

To abbreviate names:

1. Select the boxes whose names you want to abbreviate.

2. From the Text menu, select Name (ALT, T, N).

3. From the submenu that appears, select a style.

See "Changing People's Name Formats" and "Using the Make Fit Command" for more information.

Org Plus does not automatically abbreviate other kinds of information, such as titles or department names.   You must do this type of abbreviating manually.

Related topics

Changing People's Name Formats

Using the Make Fit Command

Making Your Chart Shorter

Your choice of group styles has a major effect on the height of your chart.   You can make your chart shorter by using the shorter (but wider) group styles.

In the figure below, the shortest group styles are highlighted.   The shortest are the standard horizontal styles − the top three styles in the left column.
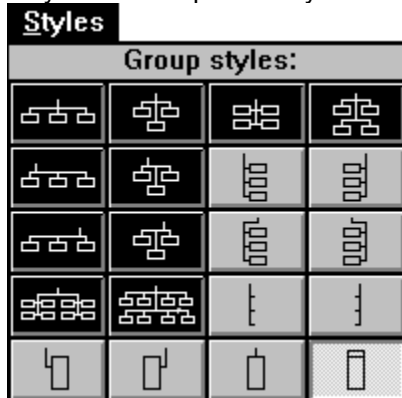
To change group styles, select the group whose style you want to change.   Then from the Styles menu, select a wider style.   See "Changing Group Styles" for more information.

Start with groups at the top of your chart and work your way down, using the wider styles at the top and the narrower styles at the bottom.

Related topics

Changing Group Styles

Making Your Chart Narrower and Shorter

The following techniques reduce both the width and the height of your chart.

Related topics

Rearrange Information

Use Smaller Fonts

Reduce Spacing Between Boxes

Rearrange Information

You can rearrange information inside and outside a box to make your <u>chart</u> narrower or shorter, depending on your needs.

To make a chart shorter, arrange information horizontally.   To make a chart narrower, arrange information vertically.

You can rearrange the information by rearranging the labels in the <u>Label Setup</u> dialog box.   See "Changing the Label Setup."

Related topics

<u>Changing the Label Setup</u>

Use Smaller Fonts

The point size of the fonts in your <u>chart</u> affect both the height and the width of your chart.   By using smaller fonts, you decrease both.

To make your text smaller, select the boxes whose text you want to reduce.   Then, from the Text menu, select Size (ALT, T, S), and select a smaller number.   See "Using the Make Fit Command."

Related topics

<u>Using the Make Fit Command</u>

Reduce Spacing Between Boxes

You can reduce the amount of space between boxes by using the Spacing dialog box.   See "Changing the Distance Between Boxes" for instructions.

Related topics

Changing the Distance Between Boxes

Using the Make Fit Command

There are two basic ways to make your <u>chart</u> fit on a desired number of pages.   One way is to make your chart smaller by using any or all of the methods described earlier in this section.   Another way is to reduce the chart on a photocopy machine.   The Make Fit command helps you do both.

To use the Make Fit command:

1. From the Chart menu, select Make Fit (ALT, C, M).

    Org Plus displays the Make Fit dialog box.

    The grid shows a maximum chart area of 10 pages by 10 pages.   Each square represents a page. The pages currently occupied by your chart are indicated by shaded squares.

2. Click in the square that indicates on which page you want the lower right corner of your chart to be.
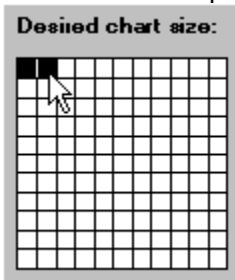
    For example, if you want your chart to fit on one page, click the top left square.   If you want your chart to fit on four pages (two pages by two pages), position your arrow two squares over and two squares down, then click.   Org Plus highlights all the rectangles above and to the left of the rectangle in which you click.

3. Select whatever space-saving options you want.

    See "Selecting the Space-saving Options" for more information.

4. Click OK to make your changes go into effect.

    If Org Plus cannot make your chart fit in the desired number of pages, you will see an alert box.

    At this point, you can do any of the following:

- Click "Cancel" to return to your chart **without** saving any of the changes that you made with the Make Fit dialog box   **OR...**

- Click "Auto Shrink" to return to your chart and save the changes that you made with the Make Fit dialog box.   In addition, Org Plus will automatically set the scaling option in the Print dialog box so that when you print your chart it will shrink to fit on the desired number of pages   **OR**...

- Click "Retry Make Fit" to return to the Make Fit dialog box and change your space-saving options (see "Selecting the Space-saving Options")   **OR**...

- Click "Done" to exit the Make Fit command and save the changes that you made with the Make Fit dialog box.

Related topics

Selecting the Space-saving Options

Selecting the Space-saving Options

The Make Fit dialog box contains several space-saving options.   Org Plus puts them into effect when you click OK in the Make Fit dialog box.   For information about a particular space-saving option, select one of the topics below.

Related topics

Abbreviating Names

Wrapping Text

Using Smaller Fonts

Changing the Page Orientation

Using Minimum Margins

Using Minimum Spacing

Auto Shrink When Printing

Abbreviating Names

Sometimes you can make your <u>chart</u> significantly smaller by abbreviating people's names.

To abbreviate people's names using the Make Fit dialog box:

1. Select the Names check box.

2. From the drop-down list, select the style of abbreviation you want.

3. Click OK.

    Org Plus closes the dialog box and makes your changes.

This feature only affects labels that have been marked for automatic name formatting.   See "Creating Labels for People's Names" for more information.

Related topics

<u>Creating Labels for People's Names</u>

Wrapping Text

You can make a <u>chart</u> much narrower (but taller) by <u>wrapping</u> text.   Wrapped text flows from one line to the next, like the text in this paragraph.   Many people do not want brief information, such as names, to wrap.   However, some information, such as a job description or a paragraph of comments, looks better wrapped.

To wrap some or all of the information in your chart using the Make Fit dialog box:

1. Select the Wrap info check box.

2. Click the Wrap info drop-down list and select the <u>label</u> for the information you want to wrap.

   If you want to, you can repeat this step to choose other labels.

3. Click OK.

   Org Plus closes the dialog box and makes your changes.

See "Wrapping Text Across Lines," for more information.

Related topics

<u>Wrapping Text Across Lines</u>

Using Smaller Fonts

Using smaller fonts can make your <u>chart</u> much smaller.

To use the Make Fit dialog box to choose a smaller font size:

1. Select the Point sizes check box.

2. Select the amount by which you want to reduce or increase the size of the text.

3. Click OK.

   Org Plus closes the dialog box and makes your changes.

If you choose "Down by 1," all text is resized to the next smallest available point size.   If you choose "Down by 2," all text is reduced by two point sizes.

Changing the Page Orientation

Some charts will fit on fewer pages if you use a different **page orientation**.   Page orientation refers to the direction in which Org Plus prints a <u>chart</u> on a page.   "Portrait" orientation means that Org Plus will print the chart with an 8 1/2" edge at the bottom of the chart, just as you would print a letter. "Landscape" orientation means that Org Plus will print the chart with an 11 1/2" edge at the bottom of the chart.   Depending on your printer, Org Plus can automatically change the page orientation for your chart if doing so will make it fit in the desired number of pages.   Select the "Auto-orientation" check box if you want Org Plus to do this.   If your printer does not support page orientation changes, this feature will not be available to you.

Using Minimum Margins

Select the "Minimum margins" check box to set your chart's margins to the minimum size permissible on the currently selected printer.   Org Plus will only use minimum margins if doing so makes your chart fit in the desired number of pages.   Minimum margins are dictated by the non-printing area on laser printers, and are at least 1/8" on dot matrix printers.

Using Minimum Spacing

Select the "Minimum spacing" check box to create a minimum amount of space between boxes.

Auto Shrink When Printing

Select the "Auto Shrink When Printing" check box to have Org Plus automatically shrink your <u>chart</u> when you print.   Org Plus will only shrink your chart if all other space-saving options are not enough to make the chart fit on the number of pages that you selected.

Cutting and Pasting Between Charts

You can cut and paste in order to move boxes from one <u>chart</u> to another.   You can also cut and paste in order to split larger charts into multiple, smaller charts or merge smaller charts into single, larger charts.

To move boxes − including entire branches − from one chart to another:

1. Select the boxes you want to transfer to another chart.

   To select an entire <u>branch</u>, click the <u>topmost box</u> in the branch.   From the Edit menu choose Select (ALT, E, S), and then choose Branch from the submenu that Org Plus displays.

2. From the Edit menu, select Cut (ALT, E, T) or Copy (ALT, E, C).

   The selected boxes, including their information and their labels, are copied to the <u>Clipboard</u> (a temporary storage place in Windows).

3. Open the chart to which you want to move the boxes.

   If the chart is already open, choose it from the bottom of the Window menu.

4. Click the box that you want to be the <u>manager</u> of the boxes on the Clipboard.

5. From the Edit menu, select Paste (ALT, E, P).

   Boxes are pasted as **subordinates** of the box you selected in step 4.

   If the labels in one chart do not match the labels in the other chart, Org Plus displays the Match Information dialog box.   See "Matching Labels in Different Charts" for instructions.

Related topics

<u>Matching Labels in Different Charts</u>

Matching Labels in Different Charts

The Match Information dialog box lets you match the labels for the information on the <u>Clipboard</u> with the labels in the <u>chart</u> to which you are pasting the boxes.

The labels for the chart to which you are pasting appear on the left side of the dialog box.   The labels for the information on the Clipboard appear on the right.   Org Plus automatically matches equivalent labels.   Labels that do not match appear on the right, below the dotted line.

To match the labels:

1. Drag each <u>label</u> up until it is opposite its equivalent label.

2. Click OK.

You can drag multiple labels up so that they are opposite a single label.   They will be joined together when pasted.

You only have to match labels for the information that you want to paste.   You do not have to paste all the information on the Clipboard.   Leave labels for information you do not care about below the dotted line.

To paste information that does not have an equivalent label, you must first create an equivalent label in the chart to which you are pasting.   See "Creating and Changing Labels" for instructions.

Related topics

<u>Creating and Changing Labels</u>

Creating a Chart Template

If you are creating charts for a large organization, you can create a <u>chart</u> <u>template</u> and then use it to create all the charts for your organization.

A **chart template** is a chart that serves as a model, or boilerplate, for all of your organization's charts. Typically, a chart template contains the basic design and settings used routinely by you or your company.

You create the basic chart template once and save it as an ordinary chart.   You then use that chart as a template when you need to create a new chart.   This allows you to type in information that is unique to your new chart or add a few new boxes without having to redo the elements that are standard to all charts.   Chart templates help ensure a common look to all the charts created for your organization.

Although any chart can serve as a template for new charts, you may want to create a chart that is used solely for this purpose.

To create a chart template:

1. From the File menu, select New (ALT, F, N).

2. Choose a <u>label setup</u>.

   See "Creating a New Chart" for more information.

3. Define additional labels and add them to the label setup for the <u>topmost box</u> as needed.

   See "Creating and Changing Labels" and "Changing the Label Setup" for more information.

4. Create a chart that is typical for your uses.

   You can enter individual names, titles, and so on.   When you later use this chart as a template, Org Plus automatically strips out information about particular individuals so that you can enter information for a new <u>group</u> of individuals.   See "Using a Chart Template" for more information.

5. Add pictures, text, and other elements that are common to all the charts that you intend to create.

   See "Placing Pictures in Your Chart," "Special Effects Through Manual Drawing," and "Annotating Your Chart," for more information.

6. Change the margins, dialog box settings, and menu settings to those you prefer to use.

7. From the File menu, select Save (ALT, F, S).

8. Type a name for the chart template.

   We recommend that you name your chart "TEMPLATE.OPX"

9. Click OK.

Your chart template is like any other chart.   To use it as a template, see "Using a Chart Template."

Related topics

<u>Creating a Chart from Scratch</u>
<u>Creating and Changing Labels</u>
<u>Changing the Label Setup</u>
<u>Using a Chart Template</u>
<u>Placing Pictures in Your Chart</u>

<u>Special Effects Through Manual Drawing</u>

<u>Annotating Your Chart</u>

Using a Chart Template

To create a new chart from a chart template:

1. From the File menu, select Open (ALT, F, O).

   Org Plus displays the Open Chart dialog box.

2. Using the Drives and Directories fields, locate your chart template.

3. Click your chart template's name.

4. Select the Template check box.

5. Click OK.

   Org Plus creates a new, untitled copy of the chart template.   You can now change this chart just like any other chart.   When you are finished, save it with a new name of your choosing.

Showing/Hiding Boxes

You can hide boxes that you don't want to be visible in your <u>chart</u>.   You can also create and then hide a box in order to create special <u>group</u> styles.

To hide a box:

1. Select the box you want to hide.

2. From the Boxes menu, select Hide Box (ALT, B, X).

3. Click in the background of your chart.

    Org Plus hides the selected boxes.

Hidden boxes are just like other boxes, except that they do not appear in your chart.   You can select them, type in them, change their styles, and anything else that you can do with visible boxes, except print them.

To show a hidden box:

1. Click the box, or drag a rectangle around the general area where you know the hidden box is located.

2. From the Boxes menu, select Show Box.

    Org Plus displays the selected boxes.

Showing/Hiding Branches

You can show or hide any branch in your chart.   If you hide all the branches except the ones you are interested in, it is easier to focus on them.   Hiding branches can also save you time because when there are fewer boxes on your screen, scrolling is faster.

To hide a branch:

1. Select the topmost box in the branch you want to hide.

2. From the Boxes menu, select Hide Branch (ALT, B, R).

   Org Plus hides the subordinates of the selected box and reformats your chart.

To show a hidden branch:

1. Select the topmost box in the hidden branch that you want to show.

2. From the Boxes menu, select Show Branch (ALT, B, R).

   Org Plus displays the subordinates of the selected box and reformats your chart.

You can also click the branch symbol in the lower right corner of the topmost box, as shown in the figure below.   If the branch symbol is not visible, from the View menu, select Show Symbols (ALT, V, Y).
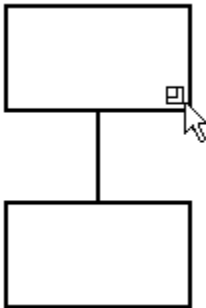
Click the branch symbol once to hide the branch, a second time to show it again.   The branch symbol never prints − it is only there to let you show or hide the branch.

Showing/Hiding Connecting Lines

By hiding connecting lines, the lines drawn automatically by Org Plus, you can make boxes seem to float by themselves − unattached to the rest of your chart.

To hide connecting lines:

1. Shift-click the line segments you want to hide.

   You can also drag an outline around the group of line segments you want to hide.

2. From the Lines menu, select Hide Connecting Line (ALT, L, H).

   Org Plus hides the connecting line.

To show a hidden line:

1. Drag an outline around the area containing the hidden line, or from the Edit menu, choose Select (ALT, E, S), and then choose Hidden Connecting Lines.

   When you use the Edit menu to select hidden connecting lines, Org Plus selects **all** hidden connecting lines.   This means that when you do step 2 below, all hidden lines will reappear.   If you want some of your hidden lines to remain hidden, Shift-click them to deselect them before you move on to step 2.

2. From the Lines menu, select Show Connecting Line (ALT, L, H).

   Org Plus displays the connecting line.

Showing/Hiding Page Lines

To show or hide <u>page lines</u>, from the View menu, select Show (or Hide) Page Lines (ALT, V, P).

Margin lines appear around the outer edges of the <u>chart page area</u> when the page lines are visible. You can drag them to change the margins.   See "Changing Your Chart Margins."

Title area lines show special areas where you can type chart titles.   See "Creating Titles."

Page border lines show you where your chart crosses pages.   They also show you at a glance how many pages your chart will span when you print it.

Related topics

<u>Changing Your Chart Margins</u>

<u>Creating Titles</u>

Previewing Your Chart

For a true preview of your <u>chart</u> as it will appear when printed, hide <u>page lines</u> and <u>branch</u> symbols. However, even when they are displayed, page lines and branch symbols do not print − they only appear on your computer screen.   To preview your entire chart at once, from the View menu, select Size to Window (ALT, V, S).

Displaying the Drawing Tools

Org Plus has four special drawing tools that you can use to create effects that are not possible with the standard box tools.

The drawing tools are not normally displayed along with the other tools.   To show the drawing tools, from the View menu, select Show Draw Tools (ALT, V, D).   The drawing tools appear in the upper right corner of your window.

To hide the tools when you are finished with them, from the View menu, select Hide Draw Tools (ALT, V, D).

About the Drawing Tools

Imagine that your <u>chart</u> is drawn on a transparency, and that transparency is on top of a piece of paper on which you can draw.   When you hand-draw objects with the special drawing tools, you draw them on this piece of paper beneath the transparency that contains your chart, **not** on the transparency itself.   To the eye, there is only one drawing, but you really have **two** drawings: your chart, which is drawn automatically by Org Plus on a transparency, and a piece of paper beneath it containing your hand-drawn objects.

The two drawings are independent of each other.   Org Plus moves the boxes in your chart as you create or delete them, but your hand-drawn objects stay where you draw them.   Depending on how your chart changes, it is entirely possible that its boxes and lines may end up such that you have to move or redraw your hand-drawn objects.   However, if you anchor a hand-drawn <u>object</u> to a box in your chart, the object will move when the box moves.   When you anchor objects to boxes, you reduce the number of times that you will have to move your hand-drawn objects manually.

For these reasons, we recommend the following:

- Always use the special drawing tools as the **last step** before printing your chart.

- Do not use the drawing tools to create the types of boxes and lines that Org Plus creates automatically.   If you draw these objects manually, it is very likely that they will not stay connected to the rest of your chart.

- When possible, anchor background objects to chart boxes.

Using the Rectangle, Octagon, or Rounded Rectangle Tool

The Rectangle, Rounded Rectangle, Octagon tools let you draw boxes that are not drawn automatically by Org Plus.   The boxes you create with these tools are always inserted beneath the boxes and lines drawn automatically by Org Plus.   You cannot cover boxes that are drawn automatically with boxes that are drawn manually.

If you want to draw a border around your entire chart, be sure to use the Border command on the chart menu instead of drawing a box manually with one of the Draw Tools.   If you draw a border manually, it will **not** automatically resize when the size of your chart changes, but a border drawn with the Border command will.

You can draw rectangles anywhere in your chart:

1. If the drawing tools are not visible, from the View menu, select Show Draw Tools (ALT, V, D).

    Org Plus displays the drawing tools.

2. Click either the Rectangle, Rounded Rectangle, or Octagon tool, as shown in the figure below.
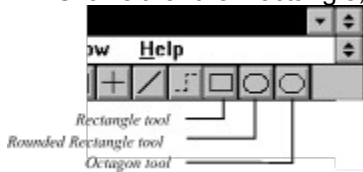
The pointer changes to a crosshair (like a plus sign).

3. Position the pointer over the exact place where you want the top left corner of the box to appear.

4. Press and hold the mouse button while you drag to the bottom right corner of the box, then release the mouse button.

    Org Plus draws the box.

You can change the shadow, color, border style, border line style, or border color of any box by first selecting the box, and then making a selection from the Boxes menu.   See "Changing Box and Line Styles."

Note: To select a manually drawn box, you must click the box border.

Related topics
Changing Box and Line Styles

Using the Perpendicular Line Tool

The Perpendicular Line tool lets you draw vertical or horizontal lines that are not drawn automatically by Org Plus.

To draw a vertical or horizontal line:

1. If the draw tools are hidden, from the View menu, select Show Draw Tools (ALT, V, D).

   Org Plus displays the drawing tools.

2. Click the Perpendicular Line tool, as shown in the figure below.

The pointer changes to a crosshair (like a plus sign).

3. Position the pointer over the exact place where you want the line to begin.

4. Press and hold the mouse button while you drag to where the line should end, then release the mouse button.

   Drag up or down to create a vertical line; left or right to create a horizontal line.

You can change the thickness, style, shadow, or color of any line by selecting the line and then making a selection from the Lines menu.   See "Changing Box and Line Styles."

Related topics
Changing Box and Line Styles

Using the Diagonal Line Tool

Use the Diagonal Line tool to draw diagonal lines in your underline. You can use diagonal lines to draw the chart viewer's attention to an object in your chart, or to draw a polygon such as a diamond.

To draw a diagonal line:

1. If the drawing tools are not visible, from the View menu, select Show Draw Tools (ALT, V, D).

   Org Plus displays the drawing tools.

2. Click the Diagonal Line tool, as shown in the figure below.

The pointer changes to a crosshair (like a plus sign).

3. Position the pointer over the exact place where you want the line to begin.

4. Press and hold the mouse button while you drag to where the line should end, then release the mouse button.

You can change the thickness, style, shadow, or color of any line by selecting the line and then making a selection from the Lines menu. See "Changing Box and Line Styles."

Related topics

Changing Box and Line Styles

Using the Connecting Line Tool

Use the Connecting Line tool to draw a connecting line between any two boxes in your <u>chart</u> that were drawn automatically.   You might do this to show a dotted line relationship.

In general, you should rearrange your chart to position boxes with <u>connecting lines</u> as close to each other as possible.   This makes your chart look less complicated, and reduces the chance that lines and boxes will overlap.   See "Rearranging Boxes in Your Chart" and "Moving Boxes in Your Chart" for more information.

1. If the drawing tools are not visible, from the View menu, select Show Draw Tools (ALT, V, D).

   Org Plus displays the drawing tools.

2. Click the Connecting Line tool, as shown in the figure below.
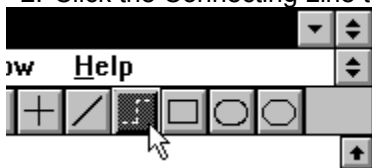
   The pointer changes to a crosshair (like a plus sign).

3. Position the pointer over the edge of the box from which the line should extend.

4. Press and hold the mouse button while you drag the pointer over the edge of the box to which you want to connect the first box, then release the mouse button.

   The Connecting Line tool can draw lines with a maximum of four angles.   This is enough to connect any two sides of any two boxes in your chart.

Related topics

<u>Rearranging Boxes in Your Chart</u>

<u>Moving Boxes in Your Chart</u>

<u>Connecting Lines and Chart Editing</u>

<u>Adjusting Connecting Lines</u>

Connecting Lines and Chart Editing

When you copy or paste boxes that are joined by a connecting line, the connecting line will also be copied.   In addition, when you delete a box that is joined by a connecting line, the connecting line will also be deleted.   Connecting lines are always included when you embed or link an entire chart into another application.

Adjusting Connecting Lines

You may need to adjust <u>connecting lines</u> to prevent them from overlapping boxes in your <u>chart</u>. Overlapping may occur when you first create the line, or after Org Plus redraws the underlying chart.

Note: You can only adjust connecting lines that have three or more segments.

To adjust a connecting line with three or more segments:

1. Position the pointer over the line segment which needs adjusting.

   You cannot adjust the segments which extend directly out of the side of a box.

2. Press and hold the mouse button while you drag the line segment left or right, or up or down.

   The direction in which you can drag depends on whether the line is vertical or horizontal.   If the line is vertical, you can drag either left or right.   If the line is horizontal, you can drag either up or down.

3. Release the mouse button.

You can change the thickness, style, shadow, or color of any line by selecting the line and then making a selection from the Lines menu.   See "Changing Box and Line Styles."

Related topics

<u>Changing Box and Line Styles</u>

Adding Arrowheads to Lines

You can add an <u>arrowhead</u> to any line segment drawn automatically by Org Plus, as long as one end of that line segment is touching a box.   In addition, you can add an arrowhead to any line that you create with the Perpendicular Line tool, the Diagonal Line tool, or the Connecting Line tool.

To add an arrowhead to a line:

1. Select the line to which you want to add an arrowhead.

2. From the Lines menu, select Arrowhead (ALT, L, D).
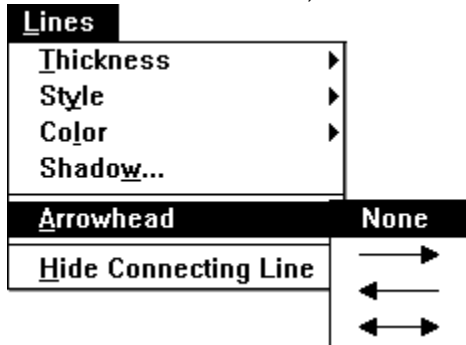
3. Make a selection from the Arrowhead submenu.

   If you select the second style, Org Plus will place the arrowhead at the right end of the line.   If you select the third style, Org Plus will place the arrowhead at the left end of the line.   If the line is vertical, the second arrowhead style places the arrowhead at the bottom of the line and the third arrowhead style places the arrowhead at the top of the line.   The last style always places an arrowhead at both ends of the line.

   When you have made your selection, Org Plus adds the arrowhead(s) to your line.

To remove an arrowhead from a line, first select the line.   Then, from the Lines menu, select Arrowheads and choose "None" from the submenu.

Arrowheads inherit their thickness, style, shadow, and color from the line to which they are attached.   To change the characteristics of any line, select the line and then make a selection from the Lines menu. See "Changing Box and Line Styles."

Related topics
<u>Changing Box and Line Styles</u>

Moving Background Text and Objects

To move an <u>object</u> drawn with the drawing tools:

1. Place the mouse pointer over the object you want to move.

2. Press and hold the mouse button while you drag the item to its new location.

3. Release the mouse button.

You can also "anchor" items that you draw manually to boxes that are drawn automatically.   This way, when the boxes in your <u>chart</u> move, the background objects will move with them.   For more information about <u>anchoring</u> background items, see "Anchoring Background Text and Objects to Chart Boxes."

Related topics

<u>Anchoring Background Text and Objects to Chart Boxes</u>

Deleting Background Text and Objects

To delete an <u>object</u> drawn with the drawing tools:

1. Select the object by clicking it.

2. Press either the Delete or Backspace key.

Anchoring Background Text and Objects to Chart Boxes

Normally, when you place an <u>object</u> such as text, a picture, or a manually-drawn box in your <u>chart</u>'s background, the object does not move when your chart changes.   This means that you must move the object manually.   However, if you want a background object to move when a particular <u>chart box</u> moves, you can **anchor** the background object to the chart box.

A chart box can have more than one background object anchored to it, but you cannot anchor a background object to more than one chart box.   In addition, if an anchored background object ends up underneath a chart box or another background object, you will still have to move the background object manually.

Related topics

<u>Anchoring</u>

<u>Unanchoring</u>

Anchoring

To anchor a background <u>object</u> to a <u>chart box</u>:

1. Select the chart box and the background object that you want to anchor together.

   You can do this by holding down the Shift key and clicking both items.

2. From the Edit menu, select Anchor (ALT, E, A).

   Org Plus anchors the chart box and the background object together.

If the edit menu command said "Unanchor," it means that you selected one of the following:

- A background object that is already anchored to another chart box

- A chart box and a background object that are already anchored together

- **Only** a chart box that is already anchored to another background object

Go back to step 1 and try again to select the chart box and the background object that you want to anchor together.

Unanchoring

To unanchor a background <u>object</u> and a <u>chart box</u> that are currently anchored together:

1. Select the chart box and the background object that you want to unanchor.

   You can do this by holding down the Shift key and clicking both items.

2. From the Edit menu, select Unanchor (ALT, E, A).

   Org Plus unanchors the chart box and the background object.

Creating Titles

You can put annotations anywhere on your chart using the Text tool. However, you should enter titles in the special **title areas**. Title areas appear within dotted lines in your chart.

To help you see where to type your chart title, Org Plus inserts the words "Chart Title" in the top center title area of new charts. You can select this text and delete it or replace it with whatever text you want. If you do not modify the words "Chart Title," they will not print.

You can also enter your chart title in any of the other chart title areas. All six of them are listed below.

- Top left
- Top center
- Top right
- Bottom left
- Bottom center
- Bottom right

To enter text into any title area:

1. From the View menu, select Show Page Lines (ALT, V, P).

2. Click in the title area where you want to enter the title text.

   Org Plus automatically aligns titles to the left in the top left and bottom left areas, to the right in the top right and bottom right title areas, and in the center in the top center and bottom center title areas. You can change a title's alignment by clicking in the title area, and then from the Text menu, selecting Left, Right, or Center.

   You can apply any font, size, style, shadow, or color to text in title areas. You can also resize title areas by dragging the vertical dotted line between title areas left or right.

Why Use Title Areas?

Although you can enter text anywhere in your chart's background (as explained in "Creating Annotations," below), the title areas are special:

- Title areas expand and contract as your chart expands and contracts. This means that the location of the title relative to your chart always remains the same.

- The top center title area and the chart never overlap, no matter what you do.

Creating Annotations

Annotations are extra text that you add to the background of your <u>chart</u>.   Annotations can make your chart more clear to the people who look at it by pointing out or adding important information.   You can place annotations anywhere in your chart.   For example, you might use this technique to create footnotes, headers, or call-outs in your chart.

To create an <u>annotation</u>:

1. Click the Text tool.

When you click off of the annotation, square black handles appear around the annotation.   You can resize that area by dragging the handles.   See "Resizing Annotation Areas."   You can also draw a box around that area.   See "Drawing Boxes Around Annotations."

Note: It is best to create annotations as the last step before printing your chart.   Imagine that your chart is drawn on a transparency, and that transparency is on top of a piece of paper on which you can draw. When you type text in any area **other than** the title areas and the boxes of the chart, you are typing onto this piece of paper beneath the transparency that contains your chart.   If you modify your chart and Org Plus reformats it, the location of the annotation you type relative to the rest of the chart may be different. There are two ways to avoid this problem.   First, you can always enter annotations as **the last step before printing your chart**.   Second, you should anchor background objects to chart boxes whenever possible.   When an <u>object</u> is anchored to a <u>chart box</u>, the object moves when the chart box moves. For more information about <u>anchoring</u>, see "Anchoring Background Text and Objects to Chart Boxes."

Related topics

<u>Resizing Annotation Areas</u>

<u>Drawing Boxes Around Annotations</u>

<u>Anchoring Background Text and Objects to Chart Boxes</u>

Resizing Annotation Areas

When you resize an <u>annotation</u> area, you are not changing the size of the text in the annotation. Instead, you are changing the way that the text in the annotation area wraps.   For example, if you have an annotation of five words on one line, you can make the annotation area more narrow and force the annotation to wrap onto two lines.

If you want to change the **size** of the text in an annotation area, select the text.   From the Text menu, select Size (ALT, T, S), and then select a point size from the submenu that Org Plus displays.

To resize an annotation area:

1. Click the Selection Arrow tool in the upper left corner of the tool bar.
2.   Click anywhere on the annotation area you wish to resize.

   Handles appear around the annotation area.

3. Drag the handles to resize the annotation area.

   You can make the annotation area larger or smaller.   Org Plus rearranges the annotation text to make it fit in the annotation area.

Drawing Boxes Around Annotations

To draw a box around an <u>annotation</u> area:

1. Click the Selection Arrow tool in the upper left corner of the tool bar.

2.   Click the annotation around which you want to draw a box.
3.   From the Boxes menu, select Border Style (ALT, B, B) and then select a border from the submenu that Org Plus displays.

   Org Plus draws a box around the selected annotation area.

You can change the shadow, color, border style, border line style, or border color of any manually-drawn box by first selecting it and then making a selection from the Boxes menu.   See "Changing Box and Line Styles" for more information.

Related topics

<u>Changing Box and Line Styles</u>

Automatic Date Annotations

The Insert Date command allows you to automatically add the creation date, the last modification date, or the last print date to the background of your <u>chart</u>.   Adding these types of dates to your charts can help you keep track of which of your charts is the most current.

To insert a date in your chart:

1. From the Text menu, select Insert Date (ALT, T, D).

    Org Plus displays the Insert Date dialog box.

2. Select the type of   date that you want to print in your chart.

    - **Creation Date** – Select this option button to have Org Plus automatically insert the date on which your chart was first created.   This date never changes.

    - **Last Modification Date** – Select this option button to have Org Plus automatically insert the date on which your chart was last modified.   This date will change each time you modify your chart.

    - **Last Print Date** – Select this option button to have Org Plus automatically insert the date on which your chart was last printed.   This date will change each time you print your chart.

3. Select the format in which you want the date to print by clicking one of the 14 sample dates in the Date Format list.

4. Click OK.

    Org Plus inserts the date into your chart's background.

5. Click the date and drag it to any location in your chart.

    You can select any font, size, style, color, and shadow for the entire date.   See "Changing Text Styles" for more information.   However, you cannot modify the text in the date.   If you do try to modify the text, Org Plus will no longer automatically update the date when necessary.

Related topics
<u>Changing Text Styles</u>

Creating Amounts Labels

Org Plus lets you work with numbers as well as text.   Because Org Plus knows the structural relationships between positions, you can do calculations that are difficult or impossible in a spreadsheet.

To use the Amounts features in your chart, you must first define an Amount label and then include that label in the label setup of the boxes where you want to use Amounts.

To create a label to hold Amounts:

1. From the Edit menu, select Define Labels (ALT, E, D).

2. Type a name for the new label in the New label field.

3. Select the Amounts option button.

   By selecting the "Amounts" option button, you will be able to use this label to manipulate numbers in your chart.   In addition, depending on how you define this Amounts label, and depending on the other Amounts labels that you define in your chart, you may be able to perform calculations with the numbers that you enter in this field in your chart's boxes.

4. Click Define.

5. Repeat steps 2 through 4 for each new amount label you want to create.

6. Click OK to close the Define Labels dialog box.

   Org Plus asks you if you want to add the newly defined labels to each box in your chart.

7. Click Yes or No.

   If you answer "Yes," Org Plus adds each new label to the bottom row of every box in your chart.   If you answer "No," the labels will not be added to each box.   However, you can add the labels to any or all boxes later by selecting the boxes in the chart and then, from the Edit menu, selecting Label Setup.   See "Changing the Label Setup" for more information.

When you have created your Amount label, see "Formatting and Setting Contents of Amount Labels."

Related topics

Changing the Label Setup

Formatting and Setting Contents of Amount Labels

Formatting and Setting Contents of Amount Labels

Once you have created an Amount label, you can use that label in one of two different ways: the Amount label can either be a **Data Amount** label or a **Computed Amount** label. In a Data Amount label you enter discrete numbers, such as an individual's salary or budget. In a Computed Amount label, you do not enter numbers, because Org Plus enters them for you. Instead, you give a Computed Amount label a formula, and Org Plus works with other Data Amount labels or Computed Amount labels in your chart to determine what number should appear in the Computed Amount label.

Whether you use an Amount label as a Data Amount or as a Computed Amount, you can select a format for the numbers that appear in that label in each box. For example, you can choose whether or not the number is a monetary value or not. You can also select how many digits you want to appear to the right of the decimal point.

If you want to use the label as a Computed Amount, you need to create a **formula** for Org Plus to use so that it can fill in the numbers for you. A formula is a **function** (see "Amounts Functions") applied to a field over a range of boxes. You have ten different choices for the types of formulas that you can use with Amount labels, including totaling, averaging, finding a minimum or maximum, and finding a standard deviation. In addition, you can ask Org Plus to count the number of boxes in a specific range.

To format and/or set the contents of an Amount label:

1. From the Edit menu, select Define Labels (ALT, E, D).

   Org Plus displays the Define Labels dialog box.

2. In the Labels in chart list, click the name of the Amount label that you want to format.

3. Click Options.

   If "Options" is grayed out, the label you selected from the "Labels in chart" list is not an Amount label.

   If the label is an Amount label, Org Plus displays the Options dialog box.

4. First select the format for the numbers that will appear in this Amount label. Each of your formatting options is described below:

   • **Currency Format** – Select this check box if you want the numbers in this Amount label to appear and print with a dollar sign (or other money symbol). The selection in your Windows Control Panel determines whether your money symbol is a dollar sign or other international money symbol.

   • **Use Separators** – Select this check box if you want numbers greater than 999 to contain commas (or periods). The selection in your Windows Control Panel determines whether your numbers contain commas or periods.

   • **Leading Zeros** – If you want a zero in front of decimal fraction numbers, select the "Yes" option button. Select the "No" option button if you do not want a zero in front of decimal fraction numbers. Select the "System Default" option button to defer to the selection in the Windows Control Panel.

   • **Decimal Digits** – Type the number of digits that you want to the right of the decimal point in the "Set to" field. The number must be between 0 and 9. Select the "System Default" option button to defer to the selection in the Windows Control Panel.

   Org Plus displays a sample of your choices in the Sample box.

   Now you can choose how to use this Amount label.

5. If you want to use this Amount label as a Data Amount, select the User-entered number option button. If you want to use this Amount label as a Computed Amount, select the Computed number option button.

    Please note that until you define at least one Data Amount field, the only function available when you select the "Computed number" option button is "Count."

    If you selected the "User-entered number" option button, skip to step 10.   If you selected the "Computed number" option button, continue with step 6 to define a formula.   You will be able to choose the function type, the Amounts label with which the function is computed, and the range of boxes that the function covers.

6. Click the first drop-down list and select the type of function that you want to use.

    You have ten choices; the table in "Amounts Functions" should help you make your selection.   (Click the >> button at the top of this screen to see the "Amounts Functions" screen.)

7. Click the second drop-down list and select the Amounts field that you want Org Plus to use when it calculates the value of the Computed Amount label.

    For example, if you were currently defining a Computed Amount label called "Total Salary," you would probably want Org Plus to use a field called something like "Salary" when it calculated the Computed Amount.

    Please note that this option is not available when you select "Count" in the first drop-down list.

8. Click the third drop-down list and select the range of boxes that you want the Computed Amount label to cover when it calculates the values.

    You have eleven choices; the table in "Amounts Ranges" should help you make your selection. (Click the >> button at the top of this screen twice to see the "Amounts Ranges" screen.)

9. If you want to exclude boxes for which the field that you selected in step 7 is empty, select the Exclude Empty Fields check box.

    Please note that excluding empty fields is not a valid option when you have selected either the "Non-Zero Count," "Count," or "Total" function.

10. Click OK to close the Options dialog box.

    You can define more Amounts labels if you need to, otherwise go to step 11.

11. Click OK to close the Define Labels dialog box.

    Org Plus asks you if you want to add the newly defined labels to each box in your chart.

12. Click Yes or No.

    If you choose "Yes," Org Plus puts one of each new label on the bottom row of each box in your chart.   If you choose "No," the labels will not be added to each box.   However, you can add the labels to any or all boxes later by selecting the boxes in the chart and then from the Edit menu, selecting Label Setup.   See "Changing the Label Setup" for more information.

Related topics

Amounts Functions

Amounts Ranges

Changing the Label Setup

Amounts Functions

When you have read this information, click the Back button at the top of this screen to return to the topic that you were reading previously.

In the table below, "Specified field" refers to the Amounts field whose numbers you want to use in the function that you choose.   For example, if you wanted to know the total salary in a group of boxes, you would choose the "Total" function, and the specified field would probably be something like "Salary."

"Range" refers to the set of boxes that you want the function to cover.

Function name	Definition
Total	The sum of the specified fields in the range
Count	The number of boxes in the range
Non-zero count	The number of boxes in the range whose specified fields have non-zero values
Average	The sum of the specified fields in the range, divided by the number of boxes in the range
Product	The product of the specified fields in the range
Minimum	The smallest value in the specified field in the range
Maximum	The largest value in the specified field in the range
Fraction of total	The specified field in a box, divided by the Total
Standard deviation*	$$\sqrt{\frac{\left(n \times \sum f^2 - \left(\sum f\right)^2\right)}{n(n-1)}}$$
Variance*	$$\frac{\left(n \times \sum f^2 - \left(\sum f\right)^2\right)}{n(n-1)}$$ Please note that the formula for the variance is not the true variance, but the sample variance. In other words, it is an estimate of the true variance.

* n = the number of boxes in the range, f = the value of a specific field in the range.   If n = 0 or if n = 1, Org Plus does not use the formulas listed.   Instead, Org Plus uses the value "0."

Related topics

Formatting and Setting the Contents of Amounts Labels

Amounts Ranges

When you have read this information, click the Back button at the top of this screen to return to the topic that you were reading previously.

Range name	Definition
Co-workers	All boxes sharing the same manager, including the manager's assistant(s)
Level	All boxes on the same level in the chart
Branch including manager	All boxes in a branch of the chart, including the branch's manager
Branch excluding manager	All boxes in a branch of the chart, excluding the branch's manager
Direct subordinates and manager	A manager and all of its direct subordinates
Direct subordinates	All of a manager's direct subordinates, excluding the manager
Entire chart	All boxes in a chart
Current manager	A box's direct manager (one level above)
All managers inclusive	A box and all of its managers (the path from the top of the tree down to that box)
All managers exclusive	All of a box's managers (the path from the top of the tree down to that box, not including that box)
Top of chart	The topmost box in the chart

Related topics

Formatting and Setting the Contents of Amounts Labels

Entering Numbers in Amounts Fields

There are a few things to know when entering information into <u>Amounts</u> fields:

- Amounts fields cannot hold letters, only numbers.   In addition, you can type the following characters in Amounts fields: "(", ")", "<", ">", "+", "-", ".", ",", "e", "E", and currency symbols.   If you enter invalid characters, Org Plus will display "#Invalid" in the field.   The   "+" and "-" are only for indicating positive or negative numbers, they are not addition and subtraction signs.

- Both "e" and "E" stand for "10 to the power of," and are for expressing numbers in exponential (scientific) notation.   Thus, "2E3" equals "2×10^3" (2,000), **not** "2^3" (8).   Exponential notation is most useful for entering numbers that contain several zeros.   Numbers that are greater than or equal to 10^{15} and numbers that are less than or equal to 10^{-8} are automatically displayed in exponential notation.

- You cannot type in numbers that are greater than 10^{300} (1E300) or less than 10^{-300} (1E-300).   If you enter a number that is outside of this range, Org Plus will display "#Invalid" in the field.

- If the number in a Computed Amount field is greater than 10^{300} or less than 10^{-300} when it is calculated, Org Plus will display "#Overflow" in the field.   Org Plus cannot display both "#Invalid" and "#Overflow" at the same time.   If both error messages apply to a field, "#Invalid" will override "#Overflow."

- If a Computed Amount field references a field that contains an "#Invalid" or "#Overflow" error message, Org Plus will display "#Error" in the field.

- If you type an open parenthesis, you must also type in a closing parenthesis.

- Org Plus will display up to 15 significant digits.

Excluding Selected Amounts from Computations

To exclude Amounts in selected boxes from computations:

1. Select the box(es) containing the Amounts that you wish to exclude from computations.

2. From the Boxes menu, select Exclude Amounts (ALT, B, E).

   Org Plus displays the Exclude Amounts dialog box.   This dialog box contains two lists.   The "Include in Computations" list on the left tells you which Amounts labels are in the selected box(es) and will be included in computations.   The "Exclude from Computations" list on the right tells you which labels will be excluded from any calculations.

3. If you want to exclude a label from calculations, click the label name in the list on the left.   If you want to include a label that has been excluded, click the label name in the list on the right.

4. Click either Include or Exclude.

   If you chose to exclude the label from calculations, it is added to the list on the right.   If you chose to include the label in calculations, it is added to the list on the left.   If you want to move all of the label names from one list to another, click either "Include All" or "Exclude All."

   Instead of selecting a label and then clicking "Include" or "Exclude," you can just double-click the label name.   Double-clicking a label name in the list on the left automatically moves the label to the list on the right and excludes it from calculations.   Double-clicking a label name in the list on the right automatically moves the label to the list on the left and includes it in calculations.

5. If you also want to exclude the selected box(es) from Counts, select the Exclude from Counts check box.

6. Click OK when you've made your selections.

   Org Plus returns you to your chart.

Note: Including or excluding a box that contains an Amount field may change the numbers in some of your Computed Amounts fields.   If you do not have the Auto Recalc command turned on, you will need to select the Recalculate Amounts command from the Chart menu.   For more information, see "Choosing When to Recalculate Amounts."

Related topics
Choosing When to Recalculate Amounts

Choosing When to Recalculate Amounts

Org Plus allows you to choose when the Computed <u>Amounts</u> in your <u>chart</u> are updated: either automatically each time you change an Amount, or manually when you select the Recalculate Amounts command from the Chart menu (ALT, C, R).

Each time you select the Auto Recalc command on the Chart menu (ALT, C, A), it toggles between "on" and "off."   If you want Org Plus to automatically recalculate your Computed Amounts fields whenever you make a change in an Amount field, make sure that a check mark appears next to the Auto Recalc command.   If you only want your Computed Amounts updated when you select the Recalculate Amounts command from the Chart menu, make sure that there is not a check mark next to the Auto Recalc command.

If it seems that Org Plus is not calculating your Computed Amounts correctly, you should make sure that you are taking hidden boxes and labels and excluded boxes and fields into account.   See "Problems with Amounts" for more information.

Related topics

<u>Problems with Amounts</u>

Translating Amounts from OPA

Org Plus for Windows 3.0 supports all Org Plus Advanced <u>Amounts</u> functions, except multiple-term functions and derived consolidation amounts and the Adjust Amounts command.   However, if you have an Org Plus Advanced <u>chart</u> that contains Amounts, there are a few things that you should be aware of before opening the chart in Org Plus for Windows.   For a complete description of using Amounts in Org Plus for Windows 3.0, see "Using Amounts: Your Chart as a Spreadsheet."   For more information about translating amounts, see the other topics listed below.

Related topics

<u>Using Amounts: Your Chart as a Spreadsheet</u>

<u>General Conversion Rules</u>

<u>Converting Formulas</u>

<u>Print Codes</u>

General Conversion Rules

- All existing <u>Amounts</u> fields are converted to Data Amounts fields in Org Plus for Windows.   The numbers remain intact, but any previously existing calculation functions are lost.   To recreate calculation functions, see "Creating Labels for Amounts."

- Suppressed Amount fields from Org Plus Advanced are hidden in Org Plus for Windows.   (Hidden labels are not included in computations.)

- Boxes that have been excluded from calculations in Org Plus Advanced are also excluded in Org Plus for Windows.

- Boxes that have been excluded from counts in Org Plus Advanced are also excluded from counts in Org Plus for Windows.

Related topics

<u>Creating Amounts Labels</u>

Converting Formulas

The tables below show how Org Plus for Windows translates the elements of a <u>formula</u>:   functions, ranges, and consolidation types.

OPA Single Term Functions	OPW Function
@CNT	Count
@CMP	Non-zero Count
@CLS	The value currently in the field remains intact
@SUM	Total
@AVG	Average
@MAX	Maximum
@MIN	Minimum
@STD	Standard Deviation
@VAR	Variance
@AMT	Total

Org Plus for Windows has two additional functions: "Product," which multiplies the values in the selected range of boxes, and "Fraction of Total," which divides the value in a single box by the sum of the values in the selected range of boxes.

Org Plus Advanced consolidation ranges can also be converted to Org Plus for Windows consolidation ranges.   The table below shows how each range is converted.

OPA Consolidation Range	OPW Range
Sib	<u>Co-workers</u>
Sub	Direct subordinates
Lvl	<u>Level</u>
Brn	<u>Branch</u> including <u>manager</u>
All	Entire <u>chart</u>
Mgr	Current manager
Top	Top of chart

Org Plus for Windows has two additional ranges: "All managers inclusive" and "All managers exclusive."

The table below shows how each consolidation type is converted.   Please note that multiple derived consolidation <u>amounts</u> will become Data amount fields in OPW, and will contain the value that was in the field at the time of conversion.

OPA Consolidation Type	OPW Function
Sum	Total (branch including manager)
Avg	Average
Product	Product (all managers inclusive)
None	The field becomes a Data Amount
Derived	The function is converted to an OPW formula according to the rules described in the "OPA Formulas" section.

Print Codes

When you print Amounts in Org Plus Advanced, you can choose which Amounts appear in your chart's boxes.   When you open an Org Plus Advanced chart in Org Plus for Windows, these printing commands determine which labels are hidden, as described in the table below.

OPA Print Code	OPW Label Behavior
Screen 1, Fields A-F:	
No	Amount label is hidden and is excluded from computations.
Amount	If the Amount label contains a formula, it is hidden and is excluded from computations.
ConAmount	If the Amount label does not contain a formula, it is hidden and is excluded from computations.
Both	Amount label is not hidden.
Screen 2, Fields A-F:	
No	No Amount labels are hidden.
Top	Amount label for the topmost box is hidden.
Bottom	Amount label for assistants and boxes on the lowest level are hidden.
Partial	If the Amount label contains a formula, it is hidden for assistants and boxes on the lowest level.

In Org Plus Advanced, you can also use "#" as a print-time code to count the number of subordinates that a box has.   Org Plus Advanced then displays the appropriate number in each box when you print. If you open an Org Plus Advanced Chart in Org Plus for Windows, these numbers will remain in the chart boxes.   However, they will not be updated as your chart changes.

Placing Pictures in Boxes

To place pictures in your chart's boxes, you must first create a label for the pictures, then include that label in the label setup for the boxes in which you want to place pictures.   See "Creating Labels for Pictures"   and "Changing the Label Setup" for instructions.   Once you have completed those tasks, proceed with the steps below:

1. In another application, copy your picture to the Clipboard or save it to disk as a Windows bitmap (BMP), a Windows metafile (WMF), a Tagged Image File (TIF), or a PC Paintbrush file (PCX).

2. In Org Plus, select the box in which you want to place the picture.

3. In that box, highlight the label for the picture.

If your picture is in a file on disk, continue with steps 5 through 8.   If your picture is on the Clipboard, finish with step 4.

4. If your picture is on the Clipboard, from the Edit menu, select Paste (ALT, E, P).

   Org Plus pastes the picture into your box.   To resize a picture in a box, see "Resizing Pictures."

5. From the File menu, select Import Picture (ALT, F, I).

6. In the File Formats field, select the format of the file that you are importing.

7. Select the file containing the picture you want to import.

8. Click OK.

   To resize a picture in a box, see "Resizing Pictures."

Related topics

Creating Labels for Pictures

Changing the Label Setup

Resizing Pictures

Placing Pictures in the Background of Your Chart

To place a picture in the background of your <u>chart</u>:

1. In another application, copy your picture to the <u>Clipboard</u> or save it to disk as a Windows bitmap (BMP), a Windows metafile (WMF), a Tagged Image File (TIF), or a PC Paintbrush file (PCX).

2. In Org Plus, click the background of your chart.

If your picture is in a file on disk, continue with steps 4 through 7.   If your picture is on the Clipboard, finish with step 3.

3. If your picture is on the Clipboard, from the Edit menu, select Paste (ALT, E, P).

   Org Plus pastes the picture into your chart.

4. From the File menu, select Import Picture (ALT, F, I).

5. In the File Formats field, select the format of the file that you are importing.

6. Select the file containing the picture you want to import.

7. Click OK.

   The picture appears in the chart window.   You can then drag it where you want.   To resize it, see "Resizing Pictures."

Related topics

<u>Resizing Pictures</u>

Drawing Borders Around Pictures in the Chart Background

Once a picture is in your <u>chart</u>'s background, you can draw a border around it.

1. Select the picture by clicking it.

2. From the Boxes menu, select Border Style (ALT, B, B), and then select a border from the submenu that Org Plus displays.

   Org Plus places a border around your picture.

Resizing Pictures

You can resize a picture after you have placed it in a box or in your <u>chart</u>'s background:

1. Double-click the picture.

   To double-click a picture in a box, you must first click the box to select it, then double-click the picture.

   Org Plus displays the Picture Sizing dialog box.

2. Choose the sizing options you want.

   To let the picture appear at its full size, select the "Full size" option button.

   To make the picture fit within a given area, select the "Scale to fit area" option button, then enter the dimensions of the area in which you want the picture to fit.   Org Plus scales the picture proportionally until it fits within the specified area.

3. Click OK.

Note: Most pictures lose quality when you resize them.   For best results, do not create pictures with the idea that you can resize them later. Make original photos the size at which you will display and print them in Org Plus.

Related topics

<u>A Sizing Shortcut</u>

A Sizing Shortcut

You can resize pictures in your <u>chart</u>'s background without using the Picture Sizing dialog box.

1. Click the picture.

   Little black squares, called handles, appear at each corner of the picture.

2. Drag any handle to resize the picture.

   When you release the mouse button, Org Plus scales the picture proportionally.

Showing/Hiding Pictures

Org Plus has to redraw pictures every time you scroll the window or make a change to your <u>chart</u>, and this takes time. You can save time by hiding the pictures that are in your chart's boxes until you need to see or print them.

Note: The Show/Hide Picture command does not affect pictures in the background of your chart.

To hide a picture:

1. Select the box containing the picture.

   To hide pictures in all of your chart's boxes, press Ctrl+A to select all the boxes.

2. From the Boxes menu, select Hide Picture (ALT, B, P).

   Org Plus hides the pictures in the selected boxes.

To show a picture:

1. Select the box containing the picture.

   To show pictures in all of your chart's boxes, press Ctrl+A to select all the boxes.

2. From the Boxes menu, select Show Picture (ALT, B, P).

   Org Plus displays the pictures in the selected boxes.

File Formats Compatible with Org Plus

Org Plus for Windows can open charts from files in any of the following formats:

- Org Plus for DOS (versions 3.1 and later)
- Org Plus for Windows (versions 1.0 and later, and Microsoft Organization Chart 1.0 and later)
- Comma-delimited text
- Tab-delimited text

Org Plus for Windows can save charts in any of the following formats:

- Organization Chart (OPX) (Org Plus for Windows 2.01 and later, and Microsoft Organization Chart 1.0 and later)
- Comma-delimited text
- Tab-delimited text
- Windows bitmap (BMP)
- Windows metafile (WMF)
- TIFF (Tagged Image File Format) (TIF)
- PC Paintbrush (PCX)

Org Plus for Windows also supports Object Linking and Embedding.   This Windows feature lets you create a chart in Org Plus and transfer it to another Windows application such as a word processor or desktop presentation program.   See "Object Linking and Embedding" for more information.

Related topics

Opening Org Plus for DOS Files

Saving as Org Plus for DOS

Org Plus for Windows and Microsoft Organization Charts

Opening Org Plus for Macintosh Files

Opening Text Files

Saving as a Text File

Object Linking and Embedding

Opening Org Plus for DOS Files

Org Plus version 3.1 and Org Plus Advanced versions 4.0 share the same <u>chart</u> file format.   Org Plus Advanced versions 6.01 and later use a different file format, Organization Chart (*.OPX).   To open a 6.01 or later chart, see "Opening an Existing Organization Chart."   To open a chart created with Org Plus version 3.1 or Org Plus Advanced versions 4.0 or later, follow the instructions below.   Org Plus for DOS drawing (*.DWG) files cannot be opened.

To open an Org Plus for DOS chart (Org Plus version 3.1 or Org Plus Advanced 4.0, 5.0, or 6.0):

1. From the File menu, select Open (ALT, F, O).

    Org Plus displays the Open Chart dialog box.

2. From the File formats drop-down list, select Org Plus 3.1, 4.0, 5.0, or 6.0.

3. Using the Drives, Directories, and File Name fields, locate the file you wish to open.

4. Click OK.

Org Plus for Windows creates a new, untitled chart containing the information from your Org Plus for DOS file.   In the new chart, some formatting will be lost.   In addition, Org Plus for DOS <u>Amounts</u> fields will be converted to Org Plus for Windows Amounts fields.   See "Translating Amounts from OPA."   You can edit and save your new chart just as you can any other Org Plus for Windows chart.   Your original Org Plus for DOS file will not be affected in any way.

Related topics

<u>Opening an Existing Organization Chart</u>

<u>Translating Amounts from OPA</u>

Differences Between the DOS and Windows Versions

There are a few differences between Org Plus for Windows and Org Plus for DOS.

- You can enter more information into the boxes of your <u>chart</u> with Org Plus for Windows.

- Org Plus for Windows gives you more control over the appearance of your chart.   For example, any <u>group</u> can have any chart style.

- Org Plus for Windows is more sophisticated about the way it arranges boxes on the page.   It can create charts that are more compact than charts created by Org Plus for DOS.

- Org Plus for Windows supports some, but not all, of the Tables/Reports and <u>Amounts</u> capabilities found in Org Plus for DOS.

Saving as Org Plus for DOS

Org Plus for Windows **cannot** save charts in a file format that can be read directly by Org Plus version 3.1 and Org Plus Advanced versions 4.0, 5.0, and 6.0.

Org Plus for Windows **can** save charts that are readable by Org Plus Advanced version 6.01.   Any <u>chart</u> that is saved with the OPX file format can be read by Org Plus Advanced version 6.01.

Org Plus for Windows and Microsoft Organization Charts

Org Plus for Windows 3.0 can open Org Plus for Windows 1.0 and later charts and Microsoft Organization Chart 1.0 and later charts.   To open any of these chart types, see "Opening an Existing Organization Chart."

Org Plus for Windows version 3.0 **cannot** save charts in a file format that Org Plus for Windows version 1.0 can read.   Any charts that you save in version 3.0 **can** be read by versions 2.0 and 2.01, because they use the Organization Chart (OPX) file format.

Related topics

Opening an Existing Organization Chart

Opening Org Plus for Macintosh Files

To open an Org Plus for Macintosh® chart, you must first save the chart with the Org Plus for IBM format and then transfer the file to your IBM or compatible computer.   You can transfer files on some types of networks.   In addition, if your Macintosh is equipped with the Apple SuperDrive™, you can use the Apple File Exchange™ utility to transfer Macintosh documents to 3.5" IBM formatted disks.   Consult your Macintosh owner's manual and your Org Plus for Macintosh User's Manual for further instructions.

Once you have transferred the file, you can open it in Org Plus using the instructions for opening Org Plus for DOS charts.   See "Opening Org Plus for DOS Files."   Org Plus for Windows cannot save charts in a Mac format.

Related topics

Opening Org Plus for DOS Files

Opening Text Files

Org Plus can open a text file that is saved in a tab- or comma-delimited ASCII file format.   "ASCII" stands for "American Standard Code for Information Interchange."   There are four standard ASCII file formats:

- ANSI Tab-delimited files

- ANSI Comma-delimited files

- PC-8 Tab-delimited files

- PC-8 Comma-delimited files

ANSI format files are generated from Windows applications and PC-8 files are generated from DOS applications.   A tab separates each text value, date, or number in a "tab-delimited" file.   A comma separates each text value, date, or number in a "comma-delimited" file.   In addition:

- Text such as names and titles must be enclosed within double quotes (in the ANSI or PC-8 Comma-delimited format only).

- Each **record**, or line, in your text file must have the same number of fields.   Those fields must be in the same order in each record.

If each data record contains the name of the employee's <u>manager</u>, Org Plus can preserve the reporting relationships of the people in your organization.   If each data record does not contain the name of the employee's manager, Org Plus creates arbitrary reporting relationships that you can then fix by moving the boxes.   See "Moving Boxes in Your <u>Chart</u>."

To open a text file:

1. From the File menu, select Open (ALT, F, O).

   Org Plus displays the Open Chart dialog box.

2. From the File formats drop-down list, select Tab-delimited text or Comma-delimited text if your ASCII file was generated from a Windows application.

   Select Tab-delimited text (PC-8) or Comma-delimited text (PC-8) from the File formats drop-down list if your ASCII file was generated from a DOS application.

3. Using the Drives, Directories, and File Name fields, locate the file you wish to open.

4. Click OK.

   Org Plus displays a dialog box asking whether the text file contains the name of each record's manager.

5. If the text file does not contain the name of the manager, click No and stop here.   You do not need to read any further.

   Org Plus creates a new, untitled chart that you can change and save as you would any other Org Plus chart.

   If the text file does contain manager data, click "Yes."

   Org Plus displays the Text Import dialog box.

   The data in the first record of the text file appears in a column in the lower right.   A scroll bar appears on the right side of the dialog box when all the data does not fit.   Scroll down to see all of the data for

the current record if it is not currently visible.   You can also scroll to the right to see the data for other records in the text file.

6. Drag the manager's name up until it is next to the first equal sign.

7. Drag the employee's name up until it is next to the second equal sign.

   If your text file has the name separated into parts (first name, middle name, last name), the name parts will appear in different rows in the Text Import dialog box.   Click and drag all the name parts up so that they are stacked up to the right of and below the equal sign.   Make sure you put them in the right order (first name above middle name, middle name above last name).

   When steps 6 and 7 are complete, you should have a data value opposite the two equal signs. There may be some data below the dotted line − ignore it.

   If each data record has the same data in the same order, the match up will be correct for all records in the text file.   You can check this by clicking the left and right arrows of the horizontal scroll bar to view the other data records in the text file.

8. Click OK.

   Org Plus creates a new, untitled chart that you can change and save as you would any other Org Plus chart.

Related topics

Moving Boxes in Your Chart

If You Have Trouble Importing a Text File

If You Have Trouble Importing a Text File

Occasionally a text import fails.   Usually the problem is that you have two people incorrectly reporting to each other in your text file.   The following suggestions should help you find the error:

- In your text file, make sure that none of the fields for the <u>manager</u> and employee names are blank (except for the topmost manager's manager, of course).

- Make sure that every record in your text file has the data in the same order.   For example, manager name first, employee name second, title last.

- Check to see that each person's name is spelled and formatted exactly the same in both the <u>subordinate</u> and manager fields.   Org Plus does not recognize James R. Smith and James Robert Smith as the same person.

- Be sure that there are no extra spaces or characters at the end of each record.

- If you cannot find the problem, split the file in half and import each half to narrow down the problem. Repeat this procedure until you find the error.

- Org Plus does have some operating limitations, such as maximum numbers of boxes and groups.   It is possible that you are exceeding those limits.   See "Operating Limitations."

Related topics

<u>Operating Limitations</u>

Saving as a Text File

To save an Org Plus <u>chart</u> as a text file:

1. From the File menu, select Save As (ALT, F, A).

2. From the File formats drop-down list, select a file format.

   If you plan to use the text file in another Windows application, select Tab-delimited text or Comma-delimited text.   If you plan to use the file in a DOS application, select Tab-delimited text (PC-8) or Comma-delimited text (PC-8).

3. Type a name for your text file in the File Name field.

4. Click OK.

   Org Plus displays the OPW-Export dialog box.

5. Select "Yes" if you wish to include the <u>manager</u>'s name in the first field of each text record.   Select "No" if you do not.

   Org Plus creates a text file containing all the data that you have typed for each box in the chart.

Saving in Graphics File Formats

You can save your Org Plus <u>chart</u> in the four graphics file formats listed below.   See any of the topics listed below for more information.

Related topics

<u>Saving as a Windows Bitmap</u>

<u>Saving as a Windows Metafile</u>

<u>Saving as a TIFF File</u>

<u>Saving as a PC Paintbrush File</u>

Saving as a Windows Bitmap

A Windows bitmap (BMP) is a standard format for graphics images.   Most Windows applications open or import bitmap files.

To save an Org Plus <u>chart</u> as a bitmap file:

1. From the File menu, select Save As (ALT, F, A).

2. From the File formats drop-down list, select Windows bitmap.

3. Type a name for your bitmap file in the File Name field.

4. Click OK.

   Org Plus displays the Windows bitmap options dialog box.

5. If you wish to change the default size of your chart image, type a percentage value in the Scaling box and press Tab to see the resulting dimensions.

   The Org Plus default is to save your chart as an 8½" by 11" page (approximately).   The chart will save in the orientation you have currently selected in the Print Setup command (on the File menu).   If your chart is much larger than one page, it will be scaled to fit.

   Because of variance in image resolutions, the "Scaling" field may show a value of less than 100% for a one-page chart.

6. Choose a format.   To save your chart as a black and white image, select the Black and white option button.   To save your chart as a color image, select either the 16 Color or 256 Color option button.

   If you are using a monochrome display, the "16 Color" and "256 Color" settings will not be available. If you are using a 16 color display, the "256 Color" setting will not be available.   Each setting represents the file format that will be used.   256 color images require significantly more disk space than 16 color or black and white images.

   The color settings often give you the best images, even if you do not have color images in your chart. This is because the black and white option converts shades of gray to black and white, while the color settings do not.   Always use color settings if they are available with the monitor you are using.

7. Choose a resolution.   To save your chart as a high-resolution image, select the 300 dpi option button. To save your chart as a low-resolution image, select the 96 dpi option button.

   High resolution images produce the best graphics, but require significantly more disk space and take more time to load and save.

8. Click OK.

   Org Plus saves a complete image of the chart with the specified name and options.

Saving as a Windows Metafile

A Windows metafile (WMF) is a standard format for graphics images.   It requires much less disk space than the Windows bitmap format.   Many applications open or import metafiles.

To save an Org Plus <u>chart</u> as a metafile:

1. From the File menu, select Save As (ALT, F, A).

2. From the File formats drop-down list, select Windows metafile.

3. Type a name for your metafile in the File Name field.

4. Click OK.

   Org Plus saves a complete image of the chart with the specified name.

Saving as a TIFF File

TIFF (Tagged Image File Format) is a graphics image format used by many DOS, Windows, and Macintosh applications.   Use TIFF if you want to transfer an image of your <u>chart</u> to an application on a Macintosh or to a DOS or Windows application that does not support metafiles or bitmaps.

To save an Org Plus chart as a TIFF file:

1. From the File menu, select Save As (ALT, F, A).

2. From the File formats drop-down list, select TIFF.

3. Type a name for your file in the File Name field.

4. Click OK.

   Org Plus displays the TIFF options dialog box.

5. If you wish to change the default size of your chart image, type a percentage value in the Scaling box and press Tab to see the resulting dimensions.

   The Org Plus default is to save your chart as an 8½" by 11" page (approximately).   The chart will be saved in the orientation you have currently selected in the Print Setup command (on the File menu). If your chart is much larger than one page, it will be scaled to fit.

   Because of variance in image resolutions, the "Scaling" field may show a value of less than 100% for a one page chart.

6. Choose a format.   To save your chart as a black and white image, select the Black and white option button.   To save your chart as a color image, select either the 16 Color or 256 Color option button.

   If you are using a monochrome display, the "16 Color" and "256 Color" settings will not be available. If you are using a 16 color display, the "256 Color" setting will not be available.   Each setting represents the file format that will be used.   256 color images require significantly more disk space than 16 color or black and white images.

   The color settings often give you the best images, even if you do not have color images in your chart. This is because the black and white option converts shades of gray to black and white, while the color settings do not.   Always use color settings if they are available with the monitor you are using.

7. Choose a resolution.   To save your chart as a high-resolution image, select the 300 dpi option button. To save your chart as a low-resolution image, select the 96 dpi option button.

   High resolution images produce the best graphics, but require significantly more disk space and take more time to load and save.

8. Choose a Compression option.   Select either the PackBits, LZW, or None option button.

   PackBits compression is available only if you are saving your chart as a black and white image. LZW compression is available only if you are saving as a color image.

   Most applications will accept TIFF PackBits or TIFF LZW format graphic files.   Because of disk space savings, we recommend that you always select an appropriate compression setting.   Select "None" only if you are sure that the application into which you wish to import the TIFF file does not accept PackBits or LZW compressed files.

9. Click OK.

Org Plus saves a complete image of the chart with the specified name and options.

Saving as a PC Paintbrush File

PC Paintbrush (PCX) is a graphics image format used by PC Paintbrush from ZSoft® Corporation.

To save an Org Plus chart as a PC Paintbrush file:

1. From the File menu, select Save As (ALT, F, A).

2. From the File formats drop-down list, select PCX.

3. Type a name for your file in the File Name field.

4. Click OK.

   Org Plus displays the PCX options dialog box.

5. If you wish to change the default size of your chart image, type a percentage value in the Scaling box and press Tab to see the resulting dimensions.

   The Org Plus default is to save your chart as an 8½" by 11" page (approximately).   The chart will save in the orientation you have currently selected in the Print Setup command (on the File menu).   If your chart is much larger than one page, it will be scaled to fit.

   Because of variance in image resolutions, the "Scaling" field may show a value of less than 100% for a one page chart.

6. Choose a format.   To save your chart as a black and white image, select the Black and white option button.   To save your chart as a color image, select either the 16 Color or 256 Color option button.

   If you are using a monochrome display, the "16 Color" and "256 Color" settings will not be available. If you are using a 16 color display, the "256 Color" setting will not be available.   Each setting represents the file format that will be used.   256 color images require significantly more disk space than 16 color or black and white images.

   The color settings often give you the best images, even if you do not have color images in your chart. This is because the black and white option converts shades of gray to black and white, while the color settings do not.   Always use color settings if they are available with the monitor you are using.

7. Choose a resolution.   To save your chart as a high-resolution image, select the 300 dpi option button. To save your chart as a low-resolution image, select the 96 dpi option button.

   High resolution images produce the best graphics, but require significantly more disk space and take more time to load and save.

8. Click OK.

   Org Plus saves a complete image of the chart with the specified name and options.

Copying and Pasting Between Applications

You can copy text from most Windows applications to the Clipboard and then paste it into your chart wherever you place the insertion point (the blinking vertical bar).

You can also copy pictures from many Windows applications to the Clipboard and then paste them directly into your chart.   See "Placing Pictures into Your Chart."

In addition, you can copy a rectangular portion of your chart to the Clipboard and then paste it into an application that accepts Bitmap or Picture (metafile) Clipboard formats.   These are standard Windows formats for graphics images.

To copy and paste a portion of your chart:

1. From the View menu, select the level of magnification you want.

   What you see in the chart window is exactly what you can copy to the Clipboard. To copy an image of the entire chart, from the View menu, select Size to Window.

2. Press and hold the Ctrl key while you drag a rectangle around the portion of your chart you want to copy to another application.
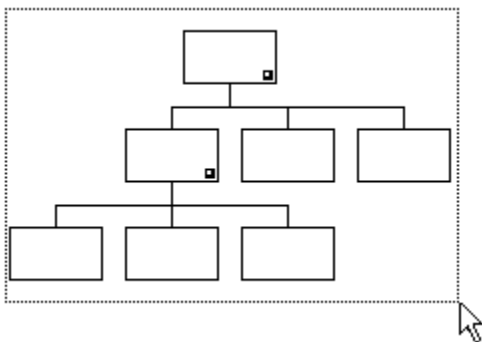
   When you release the mouse button, Org Plus places two representations of the rectangular area you defined on the Clipboard.   One is in bitmap format and the other is in metafile format.

3. Switch to the Windows application where you want to paste the chart image.

4. Click or position the insertion point where you want to paste the graphic image.

5. From the Edit menu of the target application, select Paste.

   The other application will paste the appropriate format (bitmap or metafile) of the chart image automatically.

Related topics
Placing Pictures in Your Chart

Copying a Table to the Clipboard

Using the Copy Table command, you can generate a tab-delimited table from any set of boxes and fields in your chart, except fields that contain pictures.   Org Plus automatically copies the table to the Clipboard so that you can paste it into other Windows programs such as word processors or spreadsheets.   You can choose a sorting order for the information in your table so that it is tailored to fit your needs.

To copy a table to the Clipboard:

1. Select the boxes containing information that you want to include in the table.   If no boxes are selected, Org Plus will use the information in all of your chart's boxes.

    For information about selecting boxes, see "Selecting Lines and Boxes."   You may also want to use the Find command to select a set of boxes.   For information about the Find command, see "Searching Your Chart's Boxes for Information."

2. From the Edit menu, select Copy Table (ALT, E, B).

    Org Plus displays the Copy Table to Clipboard dialog box.

3. Select the fields whose information you want to include in your table by clicking a label name in the Labels list.

    The order in which you select the labels determines the order in which the columns will appear in the table.   The first label you select will be the leftmost column in your table.   The last label you select will be the rightmost column in your table.   You can include up to 64 labels in the table.   If you want, each label can be included more than once.

    There is one special label in the Labels list: "Manager."   When you choose to include the "Manager" label, each individual in the table will have their manager's name included with their other information.

    - **Include** − Click a label name in the "Labels" list and then click "Include" to add the label to the "Include" list.   The information contained in that field will be included in your table.

    - **Include All** − Use this button to add all of the labels in the "Labels" list to the "Include" list.   Org Plus will not add duplicates of labels that are already in the "Include" list.

    - **Remove** − Click a label name in the "Include" list and then click "Remove" to remove the label from the "Include" list.   The information contained in that field will not be included in your table.

    - **Remove All** − Use this button to remove all labels from the "Include" list.

    - **Open Table Spec** − To open a list of labels and a sort order that you previously saved, click "Open Table Spec."   Org Plus displays the Open Table Spec dialog box where you can use the "File Name," "Drives," and "Directories" fields to locate the table spec that you want to open.   When you have located the table spec that you want, click OK to return to the Copy Table to Clipboard dialog box.   Since the table spec also includes the sorting order, you can skip step 4.   You can modify the table spec if you need to, but you must use "Save Table Spec" to save the changes.

    - **Save Table Spec** − If you print a particular table on a regular basis, saving a table spec for that table will save you time in the future.   The table spec contains the "Include" list as well as the sorting order.   To save the current table spec, click "Save Table Spec."   Org Plus displays the Save Table Spec dialog box where you can give the table spec a name.   When you have given the table spec a name, click OK to return to the Copy Table to Clipboard dialog box.

4. Select the sorting order for the information in your table.

- **Sort first by\Label Name** – Click this drop-down list to select the label by which your information will be sorted.   For example, if you were including the labels "Name" and "Salary" and you wanted to sort the table alphabetically by people's names, you would select the "Name" label from this drop-down list.
You can also sort the information in the table according to the order in which it appears in your chart.   This is called a "graphical" sort.   For example, if you chose "Level by Level," the information from the topmost box in your chart would appear first, then the information from the boxes on the second level of your chart, then from the third level, and so on.   Of course, if you did not choose to include information from all of the chart's boxes in the table, Org Plus would just start with the information from the highest box that you selected.
If you chose "Hierarchy Order," the information from the topmost box in your chart would appear first, then the information from the first box on the second level of your chart, then on down to the bottom of the branch headed by that box.   When Org Plus reached the bottom of that branch, it would start the branch that was headed by the second box on the second level, and so on.   Again, if you did not choose to include information from all of the chart's boxes in the table, Org Plus would just start with the information from the highest box that you selected.

- **Sort first by\Sort Order** – Click this drop-down list to select a sorting order.   Your choices are "Ascending" and "Descending."

- **Then by\Label Name** – Click this drop-down list to select a tie-breaking label.   For example, if you were sorting by "Name," but you had two individuals with the same name, you could choose "Salary" as the tie-breaking label.   You could either choose to have the individual with the highest salary or the individual with the lowest salary to come before the other individual with the same name.

- **Then by\Sort Order** – Click this drop-down list to select a sorting order for the tie-breaking label.

- **Then by\Label Name** – Click this drop-down list to select a second tie-breaking label.

- **Then by\Sort Order** – Click this drop-down list to select a sorting order for the second tie-breaking label.

You can save your current table spec so that it is easy to use in the future.   See "Save Table Spec," in step 3 of these directions.

5. Click OK.

Org Plus generates the report and places it on the Clipboard.   You can now paste it into any Windows application.

Related topics

Selecting Boxes and Lines

Searching Your Chart's Boxes for Information

Object Linking and Embedding

Org Plus supports <u>Object Linking and Embedding (OLE)</u>, a feature that lets you create and edit a <u>chart</u> in Org Plus and automatically transfer it to another application.   Other applications that support OLE include word processors and desktop presentation programs.   Once your chart is in the Windows OLE <u>client</u> application, you can open Org Plus and edit it from within that application.

Org Plus functions as an OLE <u>server</u>.   You can use it with any application that functions as an OLE **client**.   An OLE server application such as Org Plus creates the chart; an OLE client application, such as Microsoft Word®, contains the chart.

We recommend that you use TrueType® fonts when you are using the OLE feature.   TrueType fonts allow you to scale the chart in your client application with greater accuracy.

The following sections explain how to transfer an Org Plus chart, or portion of a chart, to a client application.   First, however, you should understand the difference between **embedded** charts and **linked** charts.

Related topics

<u>Object Linking vs. Object Embedding</u>

<u>Embedding a Chart</u>

<u>Linking a Chart</u>

Object Linking vs. Object Embedding

An <u>object</u> is a <u>chart</u> or a portion of a chart that you want to place in another Windows application.

You can **embed** an object in an OLE <u>client</u> document, or you can **link** an object to a client document. When you embed an object in an OLE client document, you place a copy of the original object into the client document.   It is then completely separate from the original chart.   You can edit the embedded object independently from the original chart.

When you link an object to a client document, the object appears in the client document, but it still resides in the original Org Plus document.   The client document is automatically updated when you make a change to the original Org Plus document.

For a more thorough description of Object <u>Linking</u> and <u>Embedding</u>, see Chapter 13 or the index of your Microsoft Windows 3.1 User's Guide.

Embedding a Chart

There are two ways to embed a <u>chart</u> into a <u>client</u> application's document.   The first way is to start in the client document where you want the embedded chart to appear.   The second way is to start from within Org Plus.   If you start in the client document, you can only embed a new chart.   If you want to embed an existing chart, you must start from Org Plus.

Related topics

<u>Embedding from Within the Client Application</u>

<u>Embedding from Org Plus</u>

<u>Editing an Embedded Chart</u>

Embedding from Within the Client Application

To embed a new <u>chart</u>:

1. Open the application and the document into which you want to embed the chart.

2. Move the insertion point to the place where you want the Org Plus chart inserted, or make whatever preparations are required by the application.

   Look in the index of the application's manual under "<u>embedding</u> objects" for specific instructions.

3. From the application's Edit menu, select Insert <u>Object</u>.

   If you cannot find the Insert Object command, see if there is Insert menu containing an Object command.   If you cannot find either command, your application probably does not support this method of embedding objects.

   The application should display a dialog box that lists all the applications on your computer that support OLE.

4. Select Org Plus Chart.

5. Click OK.

   Org Plus opens.

6. Create a chart.

7. From the Org Plus File menu, select Update <filename> (ALT, F, U).

   Org Plus places the chart into the <u>client</u> document.

8. From the Org Plus File menu, select Close and Return to <filename> (ALT, F, C).

   You are now back in the client application with the chart you just created.   Any future changes made to the original chart in Org Plus will not appear in the chart that is embedded in the client document.

Embedding from Org Plus

To embed an existing or new <u>chart</u> starting from Org Plus:

1. Open Org Plus.

2. Create a chart or open an existing file containing the chart you want to embed.

3. From the File menu, select Save if you want to save the chart (ALT, F, S).

4. Select the portion of the chart you want to embed.

   To select the entire chart, from the Edit menu, first choose Select, (ALT, E, S)and then choose All. Background objects, such as manually-drawn lines, and chart titles are included only if the whole chart is selected.

   See "<u>Linking</u> and <u>Embedding</u> Rules" for further information about what you need to select in order to embed various parts of your chart.

5. From the Edit menu, select Copy (ALT, E, C).

6. Open the application and the document into which you want to embed the chart.

7. Move the insertion point to the place where you want the Org Plus chart inserted, or make whatever preparations are required by the application.

   Look in the index of the application's manual under "embedding objects" for specific instructions.

8. From the application's Edit menu, select Paste (ALT, E, P).

Any future changes made to the original chart in Org Plus will not appear in the chart that is embedded into the <u>client</u> document.

Related topics

<u>Linking and Embedding Rules</u>

Editing an Embedded Chart

To edit an embedded <u>chart</u> from inside the <u>client</u> document:

1. Open the application and the document containing the embedded chart.

2. Double-click the embedded chart.

   Org Plus opens with a "live" copy of the embedded chart.

3. Edit the chart as needed.

4. From the Org Plus File menu, select Update <filename> (ALT, F, U), where < filename> is the name of your client document.

   The chart in the client document is updated to reflect your edits.

5. From the Org Plus File menu, select Close and Return to <filename> (ALT, F, C).

   Org Plus closes.

Linking a Chart

When you create a link to an Org Plus <u>chart</u>, an image of the chart is displayed in the <u>client</u> document. There is a link between that image and the original Org Plus document.   This means that when you update the original chart in Org Plus, the image of the chart in the client document will also be updated the next time you open it.

You can link an entire chart, a <u>branch</u>, or even a single box.   You can do so only from a saved chart.   If you open Org Plus and create a chart,   you must save it before <u>linking</u> it to the other application.

To link a chart to a client document:

1. Open Org Plus.

2. Create a chart or open an existing file that contains the chart you want to link.

3. If it is a new chart, from the File menu, select Save (ALT, F, S).

   You **must** save the chart before you link it to another document.

4. Select the portion of the chart you want to link.

   To select the entire chart, from the Edit menu, first choose Select (ALT, E, S), and then choose All. Chart titles and background objects, such as manually-drawn lines, are included only when you select the entire chart.

   See "Linking and <u>Embedding</u> Rules" for further information about what you need to select in order to link various parts of your chart.

5. From the Org Plus Edit menu, select Copy (ALT, E, C).

6. Open the application and the document to which you want to link the chart.

7. Move the insertion point to the place where you want the Org Plus chart inserted, or make whatever preparations are required by the client application.

   Look in the index of the client application's manual under "linking objects" for specific instructions.

8. From the client application's Edit menu, select Paste Link.

   If there is no Paste Link command, select Paste Special.   See "Using the Paste Special Command" for more information.

You now have both the original Org Plus chart and a client document containing a link to the original chart.   When you make changes to the original Org Plus chart, the changes appear in every client document that contains a link to the chart.

Related topics

<u>Linking and Embedding Rules</u>

<u>Using the Paste Special Command</u>

<u>Editing a Linked Chart</u>

Using the Paste Special Command

Some <u>client</u> applications have a Paste Special command rather than a Paste Link command.   Some client applications may have both.   The Paste Special command gives you more control over the paste operation than the Paste Link command.

When you choose the Paste Special command, the client application will display a dialog box that lists the different formats of the <u>chart</u> available on the <u>Clipboard</u>.   You are free to choose any of these formats.   If you select a format in the list and "Paste" is selectable, then the <u>object</u> can be embedded. If you select a format in the list and both "Paste" and "Paste Link" become selectable, then you can link the object.   See the table, below.

When this button is selectable...	You can do this...
Paste	Embed the chart
Paste Link	Link the chart

Select the format of the chart you want to embed or link, then click the appropriate button.

Editing a Linked Chart

You edit a linked <u>chart</u> the same way you edit an embedded chart.   The difference is that any changes you make to a linked chart appear in **all** <u>client</u> documents containing that chart, in addition to the original Org Plus document containing the chart.

To edit a linked chart:

1. Open the application and the document containing the linked chart.

2. Double-click the linked chart.

   Org Plus opens and displays the file with the original linked chart.

3. Edit the chart as needed.

4. From the Org Plus File menu, select Exit (ALT, F, X).

5. Click Yes in the confirmation dialog box that Org Plus displays.

   Org Plus closes the open chart and you exit from Org Plus.

The linked chart in the client document is updated to reflect your edits only if the Update option in the application to which your chart is linked is set to "Automatic."   If the Update option in that application is set to "Manual," you must update the link by using the Links command.   (This is available from the File or Edit menu of most client applications.)   See "Maintaining Links" for more information.

Related topics

<u>Maintaining Links</u>

Other Information about OLE

Moving Linked and Embedded Charts

Transparent Colors

Receiving Colors from the Client Application

Updating Objects After Upgrading Your Org Charting Program

Linking and Embedding Rules

Maintaining Links

Moving Linked and Embedded Charts

Charts that you link and embed are just like text – you can copy and paste them anywhere you like. You can have multiple copies in one or more documents, even in multiple applications.   Just copy the chart and then paste it in the desired location.

Transparent Colors

You can make <u>chart</u> boxes and your chart background transparent by selecting the color square in the lower-right corner of the color palette.   If you select transparent as the color for chart boxes, background colors, manually-drawn objects, and textual annotations will show through those boxes.

If you select transparent as the color for a chart's boxes or for the chart background, the boxes or background will be transparent in <u>client</u> applications **only** when you link or embed the chart as an Org Plus Chart <u>Object</u> or as a Picture.   Thus, if you have a chart whose boxes are colored None, and you link the chart as an Org Plus Chart Object or as a Picture to a Microsoft PowerPoint® presentation that has a blue background, the chart's boxes will appear to be blue.

Receiving Colors from the Client Application

When you edit a <u>chart</u> that is embedded in a <u>client</u> document, the client application may provide Org Plus with up to 20 extra colors which match the color scheme in the client document.   Microsoft PowerPoint is one application that will provide colors to Org Plus.   Word Perfect® and Microsoft Word do not provide colors to Org Plus.

Updating Objects After Upgrading Your Org Charting Program

If you installed Org Plus for Windows 3.0 to replace a "lite" version of the program, such as a version that came with another software program, you should be aware of the following: OLE objects that you created previously are still valid.   For example, if you used the "lite" version to embed a <u>chart</u> in a word processor document, when you double-click that chart in the word processor document, you can now edit the chart with Org Plus.

Linking and Embedding Rules

The following table describes what you need to select and copy to link or embed various parts of your chart.

To link or embed...	Select and copy...
An entire chart	The entire chart. Chart titles and background objects will be included.
One box	That box. Chart titles and background objects will not be included.
A single branch	That branch. Chart titles and background objects will not be included. Note that the branch will be reformatted as a complete chart.
A manager and one or more levels of subordinates within the manager's branch	The manager and one or more levels within the manager's branch. Each level selected must follow in consecutive order starting with the level of the manager. **All positions within the level(s) must be selected.** All remaining positions below the level(s) selected will not be linked or embedded. Note that the subchart will be reformatted as a complete chart. Chart titles and background objects will not be included.

Maintaining Links

When you link a chart to a client document, the link can accidentally be broken.   You will know the link is broken if you double-click the chart in the client document and get a message saying that the linked chart cannot be found.   This can happen if the linked chart has been renamed, deleted, or moved.

Many applications, such as Microsoft Word, have a Links command found under either the File or Edit menu.   When you choose the Links command, the client application will display a dialog box.   This command gives you information about the objects that are linked to your document and allows you to make changes to the objects' status.

The Links list within the Links dialog box displays four columns of information about each object that is linked to your document.   The first column lists the Windows registered name for the object. When you are using Org Plus, the Links field shows "OrgPlusChart," which is the Windows registered name for Org Plus.

The second lists the source (location) of the object.   For example, if you installed to the directory c:\orgplus, The second column would show that the object linked is located in the "C:\ORGPLUS" directory.

The third lists numbers which indicate the type of information that is linked.   The numbers will vary depending on the branch you select.   Org Plus will display a "-1" as the first number when the entire chart is selected.

The fourth column shows that the "Automatic update" option has been selected.   To change your update option, select the object, then click either the "Automatic" or "Manual" option button.   If you select "Automatic" any changes made in Org Plus are shown immediately in your client document − you

do not have to request updates, and you always have the most recent information.   If you select "Manual," you must click "Update Now" before any changes to your Org Plus chart are shown in your client document.   This option gives you more control over your client document.

When a link is broken, you can either delete the link and start over, or try to fix the link.   For detailed instructions, see "Maintaining Links" in the chapter titled "Integrating Your Windows Applications" in your Microsoft Windows 3.1 User's Guide.

File menu

New... creates a new <u>chart</u> (ALT, F, N).

Open... opens an existing chart or lets you import information from another application (ALT, F, O).

Close closes the active chart without quitting Org Plus (ALT, F, C).

Save saves changes made to the active chart (ALT, F, S).

Save As... saves a document under a new name or lets you export information to another application (ALT, F, A).

Revert... throws away all the changes you've made since you last saved the current chart (ALT, F, R).

Delete... permanently deletes the chart that you select (ALT, F, D).

Import Picture... lets you import a picture saved in a file on disk.   You can import the picture into a box in your chart or into the chart background (ALT, F, I).

Print Setup... lets you choose the printer on which to print your chart, as well as the paper size, source, and orientation (ALT, F, T).

Print...   prints the active chart according to settings you specify (ALT, F, P).

Batch Print...   allows you to print multiple charts at once (ALT, F, B).

Exit closes all charts and ends your Org Plus session (ALT, F, X).

File names allows you to open one of the last four charts you've worked with.   Simply click the chart name, or highlight the name using the arrow keys and then press Enter.

Related topics

<u>Creating a Chart from Scratch</u>

<u>Opening Existing Organization Charts</u>

<u>Closing a Chart</u>

<u>Saving a Chart</u>

<u>Using Org Plus with Other Applications</u>

<u>Placing Pictures in Your Chart</u>

<u>Printing Your Chart</u>

Edit menu

Undo reverses your last operation.   Words are added to "Undo" to tell you exactly what will be undone: for example, "Undo cut."   To undo an operation, you should choose Undo before you do anything else (ALT, E, U).

Redo sometimes replaces Undo on the Edit menu.   Use Redo to reverse an Undo (Ctrl+Z).

Cut deletes whatever is selected and places it on the <u>Clipboard</u> (ALT, E, T).

Copy creates a copy of whatever is selected and places it on the Clipboard (ALT, E, C).

Copy Contents creates a copy of the information in the selected box and places it on the Clipoard. You can then paste the information into other boxes (ALT, E, Y).

Copy Table... creates a table from the information in the selected boxes and places it on the Clipboard. You can then paste the table into any other Windows application (ALT, E, B).

Copy Setup creates a copy of the <u>label setup</u> for the selected box and places it on the Clipboard.   You can then paste that setup onto other boxes to give them the same setup.   Copy Setup also copies the box border, shadow, and color, as well as the text attributes of the selected box (ALT, E, O).

Paste places a copy of whatever is on the Clipboard into the <u>chart</u>.   Text is pasted at the insertion point. To paste boxes, you must first select a box in the chart.   The boxes on the Clipboard are pasted as subordinates to the selected box (ALT, E, P).

Clear deletes the selected objects from your chart.   Cleared objects are not placed on the Clipboard.   If you change your mind about clearing an <u>object</u>, from the Edit menu, select Undo **immediately** (ALT, E, E).

Select displays a submenu from which you can select a variety of objects in your chart, such as all boxes, all <u>assistant</u> boxes, or all hidden <u>connecting lines</u> (ALT, E, S).

Select Levels... lets you select all the boxes at specified levels in your chart (ALT, E, V).

Find... allows you to locate boxes in your chart that contain specific information (ALT, E, F).

Find Next moves you to the next matching box when you are using the Find command, described above (ALT, E, X)

Replace... allows you to locate and replace specific informaion in the boxes of your chart (ALT, E, R).

Define Labels... lets you create, delete, and rename labels.   You must define labels for the information you want to enter into the boxes of your chart (ALT, E, D).

Label Setup... lets you rearrange the information in the boxes of your chart by rearranging their labels (ALT, E, L).

Anchor allows you to invisibly attach background objects, such as manually-drawn boxes and lines, to the boxes and connecting lines in your chart that Org Plus draws automatically.   This way, when the boxes and connecting lines move, the background objects will move with them (ALT, E, A).

Options... lets you change the preset options for new charts (ALT, E, N).

Related topics

<u>Copying the Label Setup</u>

<u>Placing Pictures in Your Chart</u>

<u>Selecting Boxes and Lines</u>

View menu

Size to Window lets you see the entire <u>chart</u> in the window (ALT, V, S).

50% of Actual lets you see your chart at 50% of its Actual Size.   This lets you see as much as possible while keeping the text as legible as possible (ALT, V, 5).

Actual Size lets you see your chart at a size approximately 50% larger than the printed size (ALT, V, A).

200% of Actual lets you see your chart at 200% of its Actual Size.   This lets you see as much detail as possible (ALT, V, 2).

Show Hidden Labels lets you see hidden labels in the boxes of your chart.   Choose the command to activate it; choose it a second time to deactivate it.   A check mark appears next to it when it is activated (ALT, V, H).

Show/Hide <u>Page Lines</u> lets you show or hide the margins, title area lines, and page borders in your chart.   Choose Show Page Lines to change margins, enter titles in the title areas, or see how many pages your chart spans (ALT, V, P).

Show/Hide Symbols lets you show or hide <u>branch</u> symbols.   Branch symbols are located in the lower right corner of each <u>manager</u>'s box.   They indicate that a box has <u>subordinate</u> boxes.   You can click a manager's <u>branch symbol</u> to show or hide his or her branch (ALT, V, P).

Show/Hide Draw Tools lets you show or hide the custom drawing tools.   Use these tools to create extra lines and boxes in your chart (ALT, V, D).

Show/Hide <u>Thumbnail</u> lets you show or hide a window that contains a scaled-down sketch of your entire chart.   You can click on different areas of the thumbnail in order to navigate through your full-sized chart (ALT, V, T).

Related topics

<u>Showing/Hiding Information by Changing the Label Setup</u>

<u>Special Effects Through Showing and Hiding</u>

<u>Special Effects Through Manual Drawing</u>

Styles menu

The Styles menu contains commands for arranging the selected boxes in your chart.

The top set of styles lets you change the arrangement of boxes in a group.   The bottom set of styles lets you change the arrangement of assistant boxes with respect to their manager.   The last style in the Styles menu lets you show co-managers − managers who share responsibility for the same group of subordinates.

Related topics

Rearranging Boxes in Your Chart

Text menu

Font... lets you choose a font for the currently selected text.   The Font submenu shows only the fonts available for your printer (ALT, T, F).

Size lets you choose a size for the currently selected text (ALT, T, S).

Style lets you choose a style (bold, underline, italic) for the currently selected text (ALT, T, Y).

Color lets you choose a color for the currently selected text (ALT, T, C).

Shadow... lets you choose a shadow style, shadow color, and shadow offset from the currently selected text (ALT, T, H).

Left lets you align the selected text with the left edge of the space it occupies (ALT, T, L).

Right lets you align the selected text with the right edge of the space it occupies (ALT, T, R).

Center lets you center text in the space it occupies (ALT, T, C).

Name lets you choose a format for the currently selected names (ALT, T, N).

Word Wrap lets you wrap - split - the currently selected text across multiple lines (ALT, T, W).

Insert Date lets you insert the creation date, last modification date, or last print date in your chart.   Org Plus will automatically update these dates as needed (ALT, T, D)

Set Text lets you change the characteristics of selected text in multiple boxes in a single operation (ALT, T, T).

Related topics

Changing Text Fonts, Sizes, Styles, and Colors

Changing Text Shadows

Changing Text Alignment

Changing People's Name Formats

Wrapping Text Across Lines

Using the Set Text Command

Boxes menu

Shape lets you select a box shape for the currently selected boxes, or for the boxes you are about to create (ALT, B, A).

Color lets you change the color of the currently selected boxes (ALT, B, O).

Shadow... lets you create or change shadows for the currently selected boxes (ALT, B, W).

Border Style lets you choose a border for the currently selected boxes (ALT, B, B).

Border Color lets you choose a border color for the currently selected boxes (ALT, B, L).

Border Line Style lets you choose a border line style for the currently selected boxes (ALT, B, Y).

Show/Hide Box lets you show or hide the currently selected boxes (ALT, B, D).

Show/Hide Branch lets you show or hide the boxes reporting to the currently selected boxes (ALT, B, R).

Show/Hide Picture lets you show or hide the pictures in the currently selected boxes.   This command has no effect on pictures in the chart background (ALT, B, P).

Sort... lets you rearrange boxes in a group.   You specify by which field(s) to sort the boxes and in what order they should be sorted (ALT, T, E).

Exclude Amounts**...** lets you choose labels in your chart boxes to exclude from Amounts computations. You can also use this command to exclude selected boxes from Amounts counts (ALT, B, E).

Spacing... lets you change the distance between boxes in your chart (ALT, B, S).

Auto Width lets you turn automatic width sizing on or off for the currently selected boxes.   A check mark appears next to the command if automatic sizing is in effect for the selected box (ALT, B, W).

Auto Height lets you turn automatic height sizing on or off for the currently selected boxes.   A check mark appears next to the command if automatic sizing is in effect for the selected box (ALT, B, H).

Manual Size... lets you give the selected boxes a fixed size (ALT, B, M).

Related topics

Changing Box and Box Border Characteristics Changing Box and Box Border Characteristics

Changing Box Shadows

Special Effects Through Showing and Hiding

Placing Pictures in Your Chart

Using the Spacing Dialog Box

Restoring Automatic Sizing

Giving a Box a Fixed Size

Lines menu

Line Thickness lets you change the thickness of the currently selected lines (ALT, L, T).

Line Style lets you make the currently selected lines solid, dotted, or dashed (ALT, L, Y).

Line Color lets you change the color of the currently selected lines (ALT, L, L).

Line Shadow lets you change the shadow of the currently selected lines (ALT, L, W).

Arrowhead lets you add arrowheads to lines that already exist or to lines that you are about to create (ALT, L, A).

Show/Hide Connecting Lines lets you hide or show currently selected lines (ALT, L, H).

Related topics

Changing Line Thickness, Style, and Color
Special Effects Through Showing and Hiding

Chart menu

Make Fit... lets you select space-saving options and find out how much to reduce your <u>chart</u> to make it fit on a specified number of pages (ALT, C, M).

Center Up/Down lets you keep your chart centered between top and bottom margins, no matter what changes you make to your chart.   Choose the command to activate it; choose it a second time to deactivate it.   A check mark appears next to it when it is activated (ALT, C, U).

Center Left/Right lets you keeps your chart centered between left and right margins, no matter what changes you make to your chart.   This command has a check mark next to it when it is active.   Choose the command to deactivate it; choose it a second time to reactivate it (ALT, C, L).

Background Color lets you choose a color for the chart background (ALT, C, B).

Related topics

<u>Using the Make Fit command</u>

Window menu

Cascade Windows causes the <u>chart</u> windows to overlap so that each title bar is visible.   This lets you easily select any chart window (ALT, W, C).

Tile Windows arranges the chart windows in smaller sizes to fit in the Org Plus window.   This lets you see a little bit of each open chart (ALT, W, T).

List of open charts   The bottom of the menu shows the names of the currently open charts.   A check mark appears next to the name of the current chart -- the one whose window is in front.   You can go directly to any open chart by choosing its name from the bottom of this menu.

Help menu

Index... displays the Help Index from which you can locate the information you need (ALT, H, I).

Keyboard... displays a list of keys and their actions (ALT, H, K).

Commands... displays information about the menu commands and window icons (ALT, H, C).

Using Help... displays information about how to use Help (ALT, H, H).

Chart **Info...** displays information about your chart, including the total number of boxes and the level and style of the selected box (ALT, H, F).

System info... displays a dialog box containing information about your computer system and the version of Windows that you're using (ALT, H, S).

About... displays information about Org Plus for Windows, such as the version number (ALT, H, A).

Related topics

Mouse and Keyboard

The Tool Bar

The **tool bar** is located across the top of the Chart window.   It contains tools that you use to create and change your chart.

- General purpose tools are for selecting, editing, and viewing objects in your chart.

- Box tools are for creating boxes in your chart.

- Custom drawing tools are for custom drawing.

To use a tool once, click it.   It will revert to a selection arrow after you use it.

To use a tool multiple times, press and hold the Shift key when you click the tool icon.   You can then use the tool multiple times without having to click the icon each time you use the tool.   When you are finished using the tool, click the Selection Arrow tool (the leftmost tool).

Related topics

General Purpose Tools

The Box Tools

The Draw Tools

General Purpose Tools

Use the **Selection Arrow** tool to select and drag objects, choose menu commands, and click window and dialog box controls.

Use the **Text** tool to enter text into boxes, the title areas, and the chart background. The arrow pointer automatically changes to a text pointer when you move it over text in a selected box.

Use the **Reduce/Enlarge** tool to reduce the chart so that it fits in the window, or to magnify any part of your chart. A magnifier appears if your chart is reduced. A chart symbol appears if your chart is already at Actual Size. Simply click the tool, then click on the area of the chart you want to reduce or enlarge.

Shortcut You can temporarily activate the Reduce/Enlarge tool by pressing and holding Shift+Ctrl when you click on the chart.

Related topics

Selecting Boxes and Lines

Entering and Editing Information

Creating Titles

Creating Annotations (background text)

Viewing Your Chart at Actual, Reduced, and Enlarged Sizes

Using the Reduce/Enlarge Tool

Using the Thumbnail

The Box Tools

Use the box tools to create boxes in your chart.

Subordinate: Use the Subordinate box tool to create a subordinate to an existing box.

Co-worker Before: Use the **Co-worker Before** box tool to create a co-worker above or to the left of an existing box. Whether the box appears to the left or above depends on the group style.

Co-worker After: Use the **Co-worker After** box tool to create a co-worker below or to the right of an existing box. Whether the box appears to the right or below depends on the group style.

Manager: Use the Manager box tool to create a manager to an existing box.

Assistant: Use the Assistant box tool to create an assistant to an existing box.

Related topics

Creating and Deleting Boxes

The Draw Tools

Use the draw tools to create extra lines and boxes in your chart.   If the draw tools are not visible on the right side of the tool bar, choose Show Draw Tools from the View menu.

Use the **Perpendicular Line** tool to draw horizontal and vertical lines that are not drawn automatically by Org Plus.

Use the **Diagonal Line** tool to draw diagonal lines.

Use the **Connecting Line** tool to draw extra connecting lines, they are useful for showing dotted line relationships.

Use the **Rectangle, Rounded Rectangle,** and **Octagon** tools to draw boxes that cannot be drawn automatically by Org Plus.

Related topics

Using the Connecting Line Tool

Using the Rectangle, Rounded Rectangle, or Octagon Tools

Using the Perpendicular Line Tool

Using the Diagonal Line Tool

Working with the Keyboard

To choose a menu command directly from the keyboard (without using the mouse or the pull-down menus), press and hold the Ctrl key while you type the letter equivalent for the command.   You can see the letter equivalents next to some of the commands in the menus.   Select any of the following topics for additional keyboard operations:

Related topics

Menu Keys

Dialog Box Keys

Selection Keys

Box Creation Keys

Editing Keys

Movement Keys

Menu keys

At any time

Press this...	To do this...
Alt	Activate the menu bar
Alt+Spacebar	Open the Control menu

When the menu bar is activated (either by clicking it or pressing Alt)

Press this...	To do this...
Esc	Cancel the menu
Spacebar	Open the Control menu
Underlined letter	Display the menu. For example, type "F" to display the File menu.

When a menu is displayed

Press this...	To do this...
Underlined letter	Choose the command that begins with the underlined letter. For example, in the File menu, type "P" to choose the Print command.
Enter	Choose the highlighted command
Esc	Cancel the menu
Up Arrow	Highlight the previous command in the menu
Down Arrow	Highlight the next command in the menu
Left Arrow	Open the menu to the left
Right Arrow	Open the menu to the right
F1	Display help for the highlighted command

Dialog Box Keys

Press this...	To do this...
Tab	Move to the next item (list box, text box, button, check box, etc.)
Shift+Tab	Move to the previous item
Arrow keys	Select the next item in a list or group of similar items
Spacebar	Turn the check box item on or off when a check box is selected
	Press the button when a button is selected
Letter	Move to the next item beginning with that letter in a list or group of similar items
Alt+Underlined letter	Move to the item containing the underlined letter
Enter	Select a button with a thick border

| Esc | Cancel the dialog box |
| F1 | Display help for the command that displayed the dialog box |

Selection Keys

Press this...	To do this...
Ctrl+A	Select all the boxes in the chart
Ctrl+B	Select the branch below the selected manager(s)
Ctrl+G	Select the group to which the currently selected box belongs
Shift+Left Arrow	Extend the selection to the left
Shift+Right Arrow	Extend the selection to the right
Shift+Down Arrow	Extend the selection downwards
Shift+Up Arrow	Extend the selection upwards

Box Creation Keys

Press this...	To do this...
F2	Create a subordinate to the currently selected box
F3	Create a co-worker before the currently selected box (to the left or above the current box, depending on the group style)
F4	Create a co-worker after the currently selected box (to the right or below the current box, depending on the group style)
F5	Create a manager for the currently selected box
F6	Create an assistant to the currently selected box

Related topics

Creating and Deleting Boxes

Editing Keys

Press this...	To do this...
Del	Delete the character to the right of the insertion point if no text is selected
	Delete the selected text if text is selected
Backspace	Delete the character to the left of the insertion point if no text is selected
	Delete the selected text if text is selected
Left Arrow	Move left one character
Right Arrow	Move right one character
Shift+Left Arrow	Extend the selection one character to the left
Shift+Right Arrow	Extend the selection one character to the right
Home	Move to the beginning of the line
End	Move to the end of the line
Shift+Home	Extend the selection to the beginning of the line
Shift+End	Extend the selection to the end of the line
Esc	Close the box being edited

Movement Keys

Arrow Keys

Press this...	To do this...
Left Arrow	Move left one character when editing text
	Select the next box to the left when a box is selected
Ctrl+Left Arrow	Move to the next box to the left
Right Arrow	Move right one character when editing text
	Select the next box to the right when a box is selected
Ctrl+Right Arrow	Move to the next box to the right
Up Arrow	Move to the previous line when editing text
	Move to the next box up in the chart when a box is selected
Ctrl+Up Arrow	Move to the next box up in the chart
Down Arrow	Move to the next line when editing text
	Move to the next box down in the

chart when a box is selected

Ctrl+Down Arrow	Move to the next box down in the chart

Home and End

Press this...	To do this...
Home	Move to the beginning of the line when editing text
	Move to the top of the chart when not editing text
Ctrl+Home	Move to the top of the chart
End	Move to the end of the line when editing text
	Move to the bottom of the chart when not editing text
Ctrl+End	Move to the bottom of the chart

Page Up and Page Down

Press this...	To do this...
PgDn	Move one screen down in the chart
Ctrl+PgDn	Move one screen to the right in the chart
PgUp	Move one screen up in the chart
Ctrl+PgUp	Move one screen to the left in the chart

Tab and Enter

Press this...	To do this...
Tab	Move to the next text item in the box
Shift+Tab	Move to the previous text item in the box
Enter	Allow text editing in the box when a box is selected
	Move to the next item in the box when editing text

Function Keys

Press this...	To do this...
F9	Display your chart completely within the window
F10	Display your chart at 50% of Actual Size
F11	Display your chart at Actual Size
F12	Display your chart at 200% of Actual Size

Working with a Mouse

Selecting Boxes and Lines

Selecting and Editing Text

Selecting Boxes and Lines

Click a box or line to select it.

Shift-click a box or line to add it to the boxes and lines that are currently selected.   Shift-click it a second time to de-select it without affecting the rest of the selection.

Click in the chart background **and drag** a selection rectangle to select boxes and lines within the rectangle.

Shift-click in the chart background **and drag** a selection rectangle to add objects in the rectangle to the selection.

Double-click a box to select the entire group to which that box belongs.

Selecting and Editing Text

Click a box once to select it and get a text pointer, then **click a second time** with the text pointer in the text you want to edit.

Click the Text tool to get the text pointer, then click in text anywhere to edit it.

Click in text with the text pointer **and drag** to select a sequence of characters.

Double-click in a word with the text pointer to select the entire word.

Selecting Tools

Click a tool in the tool bar to use the tool once.

Click a box tool **multiple times** to create multiple boxes.   For example, click the Subordinate box tool six times to create six subordinates.

Click a box to select it, **then Ctrl-click** a box tool to create a box next to the selected box.

Shift-click a tool in the tool bar to use it multiple times.   When finished using the tool, click the Selection Arrow tool.

Shift-Ctrl to get the Reduce/Enlarge tool pointer, **then click** the portion of the chart you want to reduce or enlarge.   This is a convenient way to find boxes in your chart.

Related topics

Creating and Deleting Boxes

Using the Reduce/Enlarge Tool

Moving Boxes

Click and drag a box over its new co-worker or <u>manager</u> to move it and its subordinates.

Ctrl-click and drag a box over its new co-worker or manager to move a box without moving its subordinates.

Shift-click a box **and drag up or down** to move its <u>group</u> up or down.

Shift-click a box in a horizontal group of boxes **and drag left or right** to change the distance between it and the box to its left.

Related topics

<u>Moving Boxes</u>

Showing/Hiding Boxes and Branches with the Mouse

Click the box symbol in the lower right corner of a <u>manager</u>'s box to show or hide that manager's subordinates.

Capturing Pictures of Your Chart

Ctrl-click and drag diagonally in the <u>chart</u> background to capture and paste a rectangular area of the chart to the <u>Clipboard</u>.

Related topics

<u>Copying and Pasting Between Applications</u>

Contacting Banner Blue Software

To contact Technical Support:

Phone: 510-794-6850

It is recommended that you call while in front of your computer with Org Plus running.   Please also have the following ready:

- Your Org Plus User's Manual

- A description of your computer hardware and system software configuration, including the version numbers of Windows and DOS.

Please write or fax to let us know how we can make Org Plus better.   Our address is below:

Banner Blue
Technical Support
P.O. Box 7865
Fremont, CA 94537

Fax: 510-795-4488

Banner Blue Software Order Department

You can purchase the feature-complete version of Org Plus for Windows by contacting the order department:

Phone: 510-794-6850

Fax: 510-795-4488

Banner Blue
P.O. Box 7865
Fremont, CA 94537

If you send a fax or letter, be sure to include a phone number, fax number, or address where we can reach you.

System Troubleshooting for Microsoft Windows

Frequently, problems in Windows applications are related to the system configuration.   To determine if this is the case, you should try a clean boot.   A "clean boot" is the process of starting your computer and Windows with only the essential elements your computer and Windows need to run.   To do this, you must edit your WIN.INI, CONFIG.SYS and AUTOEXEC.BAT files in order to prepare your system for the clean boot.

The editing steps outlined below assume that you do not have any TSR (Terminate & Stay Resident) programs that your system requires in order to function properly.   (A disk doubling program would be an example of such a TSR.)   If you are using any such TSRs, then you will need to identify which lines belong to the TSRs in your AUTOEXEC.BAT and CONFIG.SYS files and make sure that you do **not** modify these lines.   Refer to documentation provided by your TSR programs to determine if you need them.   If you aren't sure, leave them alone.

Note: Please make notes of the changes you make.   If you need to contact Banner Blue Technical Support after you have tried the clean boot, we will need to know *exactly* what you have tried so far.

To edit your files

1. While running Windows, bring up the Program Manager.

2. From the File menu, select Run.

3. Type SYSEDIT in the Command Line box and click OK.

   This will bring up the System Edit program, along with your SYSTEM.INI, CONFIG.SYS, AUTOEXEC.BAT, and WIN.INI files.   You do not need to change your SYSTEM.INI file.

4. Click the Window titled AUTOEXEC.BAT.

5. Type REM at the beginning of each line in the AUTOEXEC.BAT file except for lines which start with the following entries:

   prompt=...

   path=...

   set temp=...

   Typing REM at the beginning of a line temporarily prevents the computer from running that line.

Note: Do not type REM in front of any lines pertaining to critical TSRs.   See the second paragraph of this topic.

6. Click on the window titled CONFIG.SYS.

7. Type REM at the beginning of each line of the CONFIG.SYS file except for the lines which start with the following entries:

   files=...

   buffers=...

   stacks=...

   device=<path>himem.sys

Note: If you are using a memory manager other than himem.sys, such as Qemm or 386max, **do not** type REM in front of the lines for your memory manager. Consult the documentation for your memory manager if you are not sure which lines pertain to it. Also, **do not** type REM in front of any lines pertaining to critical TSRs. See the second paragraph of this topic, for more information.

8. Click the window titled WIN.INI.

9. Type REM at the beginning of each line in the WIN.INI file **that starts with**:

   run=...

   load=...

10. From the File menu, select Save.

    The System Configuration Editor saves the changes you have made.

11. Exit Windows.

12. Restart your computer. At this point you are doing a "clean boot."

13. Start Windows. As you start Windows, hold down the Shift key. This will prevent any programs in the Startup Program Group from loading.

Note: If Windows normally starts automatically when you turn your computer on but doesn't start now, you can start it by typing `win` at the C:\> prompt and then pressing Enter.

14. Start Org Plus and make sure it functions properly.

   If your program functions properly after you do a clean boot, then you know that one of the items you "REM"ed out of your AUTOEXEC.BAT, CONFIG.SYS, or WIN.INI file is causing the problem. If this is the case, you can try to isolate which line it was by running Sysedit again, removing one "REM" (to add that item back in), restarting your computer, and trying again. Once you isolate which line was causing the problem, contact the manufacturer of that program.

   If the clean boot did not solve your problem, there is a good chance that the problem you are experiencing is being caused by an error in the program itself. Please call Banner Blue's Technical Support for further assistance.

Font Command

The Font command, on the Text menu, displays the standard font dialog box.   The dialog box allows you to select your font, font style, and font size.

You also have the option to select your font size through the Size command and your font style through the Style command.   Changes to font size and font style made through the Font command will be reflected in the Size and Style commands.

Related topics

Changing Text Styles

Working with Shadows

When you create a shadow for lines, text, or boxes, there are a few guidelines to follow:

- Shadows, borders, and highlights should not be the same color as the items that they border, such as the <u>chart</u> background or each other.   If they are they same color, they may not be visible in the chart.

- The following color combinations make an attractive chart: make the chart background color, box color, and box line color gray.   The shadow highlight color on the boxes should be white, and the shadow color should be black.   Text should be black, or a bright color such as red or blue.   The text shadow highlight color should be white, and the text shadow color should be black.

- Your chart looks best if you choose the same shadow style and offset for all elements.   Too many different styles and offsets will make the chart look cluttered.

- The size of the offset that you choose for lines, boxes, and text is important.   When you are working with a 3-dimensional shadow (styles 6 through 9 for boxes, styles 4 and 5 for lines, and styles 4 and 5 for text) offsets of 1 or 2 look best.   When you are working with 2-dimensional styles (all other styles) offsets from 3 to 8 look attractive.   With 2-dimensional styles, small text should have small offsets, such as 3 or 4, while larger text can handle larger offsets.   Titles, background text, and background objects should have a shadow offset that matches the box shadow offset.   If the offset is different, these items will appear to be raised different distances off the page.

Related topics

<u>Creating Box Shadows</u>

<u>Creating Line Shadows</u>

<u>Creating Text Shadows</u>

Low Resources Error Messages

When your system resources are low, Org Plus may not work properly.   The following steps should increase the amount of resources available to Org Plus.

- Close all other open applications to make more resources available.   Then try using Org Plus again.

- If the problem persists, close Windows completely.   Then restart Windows and Org Plus.

Generic Printer Error Messages

The printer that is currently selected is not capable of printing the graphics created by Org Plus for Windows.   Please use the Print Setup dialog box to select another printer.   Print Setup is located on the File menu.

DWG Files

A *.DWG file is a drawing file that was created by the Org Plus for DOS drawing program.   Usually a drawing file has an Org Plus for DOS <u>chart</u> file associated with it.   Org Plus for Windows **does not** open *.DWG files, but it **does** open the associated chart file.   Consult an Org Plus for DOS manual for a detailed explanation of the differences between Org Plus for DOS drawing files and chart files.

File Opening Errors

When you have trouble opening a particular file, check the following:

- You have entered the file name correctly.   Verify that the spelling and file extension are correct.

- You have selected the right drive and directory.   Make sure that the drive and directories that you have chosen are actually where the file is located.

- Less than four files are already open.   Depending on your system's capabilities, Org Plus can only open up to four files at once.

Related topics

Creating, Opening, and Saving Charts

Low Memory Error Messages

When your system's memory is low, Org Plus may not work properly.   The following steps should increase the amount of system memory or disk space.

- Make sure you have more than 40% resources, with at least 2 megabytes of free memory.   To check your resources, select About from the Help menu in Program Manager.   Closing other applications may help increase available resources and memory.

- Also, make sure that you have enough disk space available.

If you are trying to save a file to disk and Org Plus indicates that it is unable to save the file, the disk is probably full.   Either delete something from the disk or save to a different disk or different drive.

Damaged File Errors

If Org Plus is unable to read the format of your file, the file may be damaged.

Maximum Groups Error Messages

A group is a selection of subordinates that all have the same manager.   For example if a company has a VP of Operations and three Operations Managers who all report to the VP, then the three Operations Managers would all be in the same group.   If an Operations Manager has 5 subordinates, those 5 subordinates would form their own group.   Org Plus files may not have more than 255 groups in a single chart.

If you get an error message stating that you have more than 255 groups in your chart and do not think that your company actually has more than 255 groups, you may have inadvertently created extra groups.

To correctly create a group of subordinates, you should click on the manager's box each time you want to add a subordinate.   Do not click on a subordinate's box to add another subordinate to the same group.

File Format Error Messages

In addition to files with the OPX format, Org Plus can open the following types of charts:

- Org Plus version 3.1 and Org Plus Advanced versions 4.0, 5.0, and 6.0.   (Org Plus Advanced 6.01 already uses the OPX file format)

- Org Plus for Macintosh

- ANSI Tab-delimited files (*.txt)

- ANSI Comma-delimited files (*.txt)

- PC-8 Tab-delimited files (*.txt)

- PC-8 Comma-delimited files (*.txt)

For information about opening file types other than OPX, see "Using Org Plus with Other Applications."

Related topics

Using Org Plus with Other Applications

Consolidated Amount Errors

If you open an Org Plus Advanced <u>chart</u> that contains Consolidated <u>Amounts</u>, the numbers may appear in your Org Plus file, but you cannot perform any Consolidated Amounts operations on them.   In Org Plus, the numbers are treated as text, just like someone's name or title.

Saving the Clipboard's Contents

When you exit Org Plus, it may ask if you want to save the contents of the <u>Clipboard</u>.   You can do one of two things:

- Choose Yes to save the information on the Clipboard.   If you choose Yes, you can paste the information into other applications once Org Plus has closed.   This information stays on the Clipboard until you copy or cut in any other Windows application or exit Windows.

- Choose No to permanently discard the information from the Clipboard.   You will not be able to paste the information anywhere.

Replace Existing Document

When you get an error message asking whether or not you want to replace the existing document, you already have a file saved under that name.   You have two choices:

• Click OK to replace the old file with your new file.

• Click Cancel to cancel the operation.   You can save your file with a new name by choosing Save As from the File menu.

Revert

You made changes to a document and then tried to open it again.   You can do either of the following:

- was before you made the changes, thereby losing all changes that you have made.
- Click Cancel to cancel the operation.

When Your Chart is Too Big to Open

Org Plus cannot open charts that are larger than 110"x110".   If you get an error message stating that the <u>chart</u> you want to open is too big, you must do the following:

1. Open the application that you used to create the chart.

2. Open your chart in that application.

3. Modify the chart so that it is 110"x110" or smaller.

Once your chart is 110"x110" or smaller, save it and quit the application.   Then you can try opening it in Org Plus again.

Problems with Amounts

Hiding boxes and labels does **not** exclude them from computations, even though you cannot see the numbers that they contain on the screen.   In addition, excluding a label or box from calculations does **not** hide that box or label.   Both of these facts can make the Computed Amounts on your screen look incorrect.   If your numbers look incorrect, try the following:

- Make sure that you haven't hidden any of the boxes or labels that you want to include.   See "Showing/Hiding Boxes" and "Showing/Hiding Information by Changing the Label Setup."

- Hide any boxes or labels that you've excluded from computations.   See "Showing/Hiding Boxes" and "Showing Hidden Information."

- Make sure that you haven't excluded any of the boxes or labels that you want to include.   See "Excluding Selected Amounts from Computations."   You should also see step 9 of "Formatting and Setting Contents of Amounts Labels."

- Exclude any boxes or labels that you've hidden.   See "Excluding Selected Amounts from Computations."   You should also see step 9 of "Formatting and Setting Contents of Amounts Labels."

Finding excluded information is quick when you use the Find command.   See "Searching Your Chart's Boxes for Information."

Related topics

Showing/Hiding Boxes

Showing Hidden Information

Excluding Selecting Amounts from Computations

Formatting and Setting Contents of Amounts Labels

Searching\Replacing Amounts and Names

When you want to search for and replace information in name fields and <u>Amounts</u> fields, remember that the name or number that you see **on screen** may be different than the name or number that is actually **stored** in Org Plus.   These differences are due to name and number formatting choices that you make. For example, you can enter a name as "Johnathan Robert Murphy," and then tell Org Plus to display the name as "J. R. Murphy."

If you want to search for and replace information in a name or Amounts field, we recommend that you search for the information that is stored in Org Plus, not what you see on screen.   Org Plus can find information that you see on screen, but it will not allow you to replace it.

To see a field's information, click the box containing that field, and then click the field itself.

Chart Info

Displays information about your <u>chart</u>, including the total number of boxes and the <u>level</u> and style of the selected box(es).

Chart Info	
Boxes in the chart:	24
Boxes selected:	1
Level selected:	2
Current group style:	1

OK

System Info

The System Info command on the Help menu (ALT, H, S) displays a dialog box containing information about your computer system, including the available resources and memory, and the version of Windows that you're using.   You can also access system files such as sysedit.exe from this dialog box.

This is information that you may need when speaking to Banner Blue Technical support.

Operating Limitations

Minimum hardware	An IBM or compatible personal computer using an 80386 or higher processor
Minimum disk configuration	Hard disk with 3 megabytes of available space
Minimum memory (RAM) required	4 megabytes
Minimum system software	DOS version 3.1 or later and Microsoft Windows version 3.1 or later
Maximum charts open at one time	4 (depending on your system's configuration)
Maximum boxes per chart	Up to 32,000 depending on amount of memory available
Maximum number of groups	255
Maximum number of levels	50
Maximum number of labels	30 (people's names take up two labels)
Maximum number of characters per field	25,000
Maximum number of characters per box	25,000
Maximum number of boxes per group	100
Minimum box size	.125" wide by .07" high
Maximum box size	110" X 110", depending on the resolution of your printer.
Maximum chart size	110" X 110", depending on the resolution of your printer.

Circular Reference Errors

When you import an Org Plus Advanced chart that contains Amounts fields, Org Plus for Windows checks the chart for circular references.   "Circular references" are formulas in two or more Amounts fields that refer to each other in a way that makes it impossible to determine values for the fields.   For example, the following two equations would create circular reference: field a_ @SUM (Brn, B) @SUM (Brn, A).

When you get a circular reference error message, you must go into the Define labels dialog box and look at the formulas in your Amounts fields to determine which formulas are causing the error message. If you have several formulas in your chart, it may be helpful to write them all on a piece of paper in order to determine where the problem is.

Glossary of Terms

Amounts

Anchoring

Annotation

Arrowhead

Assistant

Assistant Style

Automatic Sizing

Batch Printing

Bitmap (BMP)

Branch

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Chart

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Amounts

Labels in your <u>chart</u> that are designed to hold numbers.   You can create Amounts labels that contain formulas, making your chart act like a spreadsheet.

Anchoring

Invisibly connecting a background <u>object</u> in your <u>chart</u> to a <u>chart box</u>.   When a background object is anchored to a chart box, it will automatically move each time the chart box moves.

Annotation

Miscellaneous text entered into your <u>chart</u> background for the purposes of labeling, clarifying, or explaining the elements in your chart.

Arrowhead

A directional pointer that you can attach to the end of a line.   Use arrowheads to highlight important information in your <u>chart</u> or to indicate the flow of procedures or decisions.

Assistant

A box representing an individual who provides administrative assistance, advice, or even managerial assistance to its <u>manager</u> (sometimes referred to as a "staff" box).   Some assistants, such as secretaries, provide administrative assistance only.   Other assistants may actually operate in the place of their managers when the manager is absent.   Different assistant styles are available to show the particular type of relationship between the assistant and its manager.

Assistant Style

A way to represent the relationship of a <u>manager</u> with an <u>assistant</u>.   Assistant styles are available from the Styles menu.

Automatic Sizing

The feature which ensures that your <u>chart</u> boxes have uniform sizes.   Available from the Boxes menu.

Batch Printing

Printing multiple charts with one command.   Available from the File menu.

Bitmap (BMP)

A standard graphics image file format.   Org Plus can copy BMP images to and from the Clipboard.   It can also paste any visible portion of your chart to the Clipboard in this format.

Branch

A box and all the boxes that report to it, all of the way to the bottom of the <u>chart</u>.

Branch Symbol

A small square appearing in the lower right corner of <u>manager</u> boxes.   It indicates that the box has <u>subordinate</u> boxes.   You can click the <u>branch</u> symbol to show or hide the rest of the branch.
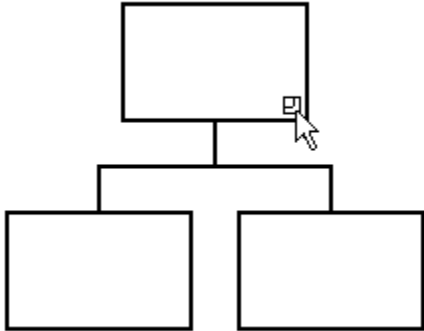
Chart

A graphical representation of an organization; the type of document that Org Plus creates.

Chart Box

Chart boxes are the building blocks of a <u>chart</u>.   Generally, each individual in the chart has their own box in which you can enter information.   Org Plus automatically draws <u>connecting lines</u> between the boxes. The arrangement of the chart boxes and the connections between them depict the reporting relationships in the organization.

Chart Page Area

The area occupied by the underline chart.   This area consists of a single page or a number of pages placed side by side to produce a larger rectangular area.   Dotted lines indicate the borders between two adjacent pages.   For example:

{bmc help0002.wmf}

Org Plus automatically adds and subtracts pages to and from the chart's page area as needed to contain the chart.   It preserves the basic page orientation specified in the Page Setup dialog box.

Client

An application to which you can link or embed an <u>object</u> created by a <u>server</u> application.   Org Plus functions as a server application.   An OLE server application, such as Org Plus, creates the <u>chart</u>; an OLE client application, such as Microsoft Word® 6.0, contains a copy of the chart.

Clipboard

A temporary storage place in Windows.   Use the Cut and Copy commands to place items on the Clipboard, and use the Paste command to paste items from the Clipboard into your Org <u>Chart</u>.

Co-manager

One or more boxes that share responsibility for a <u>group</u> of subordinates.   The highlighted boxes in the figure below are co-managers.   You can show the co-<u>manager</u> relationship with the co-manager style in the Styles menu.
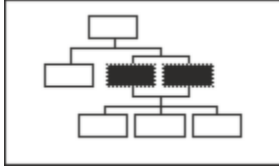
Connecting Lines

The lines Org Plus draws automatically to connect the various boxes in the <u>chart</u>.

Co-workers

Boxes with the same <u>manager</u>.   Together, co-workers form a <u>group</u>.

Dotted-line Relationship

A special reporting relationship between two boxes in the <u>chart</u>.   A dotted line usually indicates that the one box has some measure of authority over the other box, or that they collaborate on certain types of projects, but the exact nature of that authority isn't usually indicated in the chart.   You can draw dotted-line relationships with the Connecting Line tool.

Embedding

You can embed an <u>object</u> in an OLE <u>client</u> document.   When you embed an object in an OLE client document, you place a copy of the original object into the client document.   It is then completely separate from the original <u>chart</u>.   You can edit the embedded object independently from the original chart.

Formula

Formulas are for calculating <u>Amounts</u> in your <u>chart</u>.   You create a formula by applying an Amounts function, such as "Average" or "Standard Deviation." to a <u>group</u> of boxes.   That group of boxes must have an Amounts field to which you can apply the function.

Group

All of the boxes reporting to the same <u>manager,</u> excluding <u>assistant</u> boxes.   The group is the basic building block of all Org Plus charts.   It consists of <u>co-workers</u>.

Group Style

The particular arrangement of boxes in a <u>group</u>.   Separate groups can have different group styles. Group styles are located in the Styles menu.

Label

A name for a field in a <u>chart box</u>.   Labels indicate which type of information you should enter in which field.   For example, you could have a field labeled "Name" and another field labeled "Title" in your chart boxes.   Each chart can have up to 30 different labels in it, although labels that are used for people's names take up 2 of the possible 30.

Label Setup

The way labels are arranged in your <u>chart</u>'s boxes.   Different boxes can have different <u>label</u> setups.

Level

The topmost box in your chart is at level 1.   The boxes reporting directly to it are at level 2.   The boxes reporting to them are at level 3, and so on.   Org Plus supports up to 50 levels in a chart.

Linking

You can link an <u>object</u> to an OLE <u>client</u> document.   When you link an object to an OLE client document, the object appears in the client document, but it still resides in the original Org Plus document.   The client document is automatically updated when you make a change to the original Org Plus document.

Manager

A box that has other boxes − its subordinates − reporting to it.
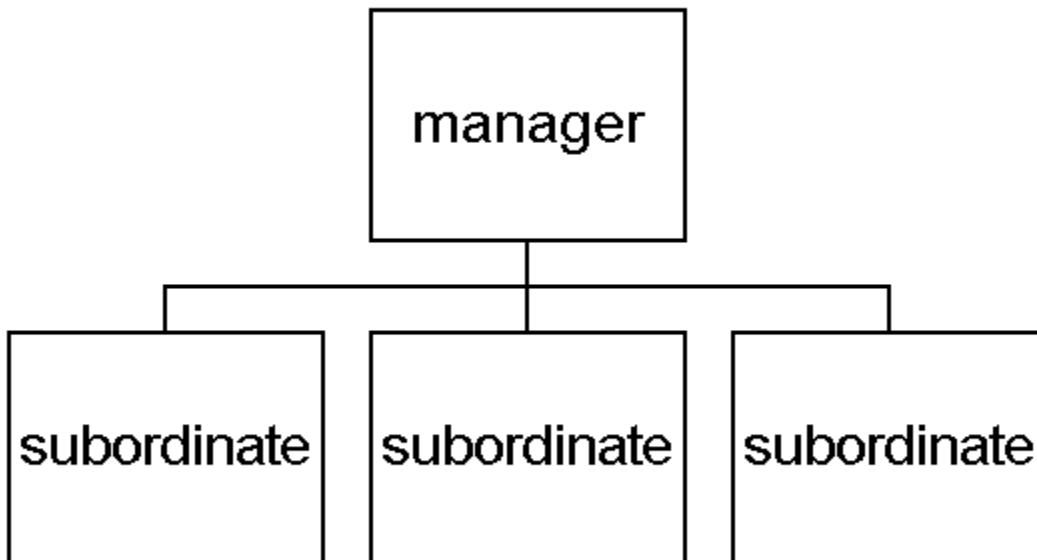
A manager does not necessarily have to be the topmost box in the chart.

Metafile (WMF)

A standard graphics image file format.   Metafiles require less disk space than regular bitmaps.

Object

"Object" refers to items that you place in the background of your <u>chart</u>, such as textual annotations and boxes and lines that you draw with the Drawing Tools.

An object can also be a chart or a portion of a chart that you want to place in another Windows application using <u>Object Linking and Embedding (OLE)</u>.

Object Linking and Embedding (OLE)

Org Plus supports <u>Object</u> <u>Linking</u> and <u>Embedding</u> (OLE), a feature that lets you create and edit a <u>chart</u> in Org Plus and automatically transfer a copy of it to another application.   Other applications that support OLE include word processors and desktop presentation programs.   Once your chart is linked to or embedded in a Windows OLE <u>client</u> application, you can open Org Plus and edit the chart from within that client application.

Page Lines

Dotted lines that indicate the locations of margins, title areas, and page borders.   These lines do not print.   To make page lines invisible, from the View menu, select Hide Page Lines.   To show page lines, from the View menu, select Show Page Lines.

PC Paintbrush (PCX)

A graphics image file format used by PC Paintbrush from ZSoft® Corporation and many other image programs.

Secondary Mouse Button

The button on your mouse that you do not normally use for clicking and selecting.   When you click the secondary mouse button on an item in your chart, Org Plus displays a floating menu containing commands for that item.

Server

Org Plus functions as an OLE server.   A server is an application in which you can create objects to link or embed in a <u>client</u> application.   An OLE server application, such as Org Plus, creates the <u>chart</u>; an OLE client application, such as Microsoft Word® 6.0, contains the chart.

Subgroup

A grouping of boxes within a larger group.   In the figure below, a, b, and c belong to one subgroup, and d, e, and f belong to another subgroup.   Both of these subgroups belong to the same group because they have the same manager.

{bmc help0005.wmf}

Subordinate

Any box that reports to another box.

Tagged Image File Format (TIFF)

A graphics image file format used by many DOS, Windows, and Macintosh applications.   Use TIFF if you want to place an image of your chart in an application on a Macintosh, or in a DOS or Windows application that does not support metafiles or bitmaps.

Template

A <u>chart</u> containing a basic chart design.   A chart template is like a pad of preprinted charts with empty boxes.   When you open a chart as a template, you "tear off" a chart from the pad, and can then fill in the boxes.

Thumbnail

A small sketch of an entire <u>chart</u> that you can display on top of your full-sized chart.   You can click in the thumbnail to navigate through your full-sized chart.

Topmost Box

The box at the top of the <u>chart</u>.   The head honcho.   The big cheese.   Usually the President or CEO.

Wrapping

Allowing a phrase or sentence to split − or "wrap" − from one line to the next, as opposed to requiring it to fit on a single line.   For example, a long sentence in a book does not fit one one line, but wraps onto multiple lines.