◼ File menu commands

The File menu offers the following commands:

New	Creates a new chart.
Open	Opens an existing chart.
Close	Closes an opened chart.
Save	Saves an opened chart using the same file name.
Save As	Saves an opened chart to a specified file name.
Print	Prints the Current View of the active chart.
Print Preview	Displays the Current View of the active chart as it would appear when printed.
Print Setup	Selects a printer and printer connection.
Preferences	Change TreeChart program preferences.
1,2,3,4	Opens one of four most recently used files.
Exit	Exits TreeChart.

◆

Window menu commands

The Window menu offers the following commands to enable you to arrange and switch between different chart windows in the TreeChart application window:

Cascade	Arranges windows so that they overlap.
Tile Horizontal	Arranges chart windows side by side.
Tile Vertical	Arranges windows stacked vertically.
Arrange Icons	Arranges icons of minimized chart windows.
Window 1, 2, ...	Goes to specified chart window.

New command (File menu)

Use this command to create a new chart in TreeChart.

If you have specified a <u>Template File</u>, the Template File is loaded to serve as the initial settings for your new chart.

You can open multiple charts at once. Use commands on the Window menu to switch among the multiple open charts and arrange chart windows.

You can open an existing chart with the Open command.

Shortcuts

Toolbar:

Keys: CTRL+N

See Also

<u>Open command</u>
<u>Speeding up your work with Template Files</u>
<u>Window menu</u>

Open command (File menu)

Use this command to open an existing chart in a new window.

You can open multiple charts at once. Use commands on the Window menu to switch among the multiple open charts and arrange chart windows.

You can quickly open one of the four most recently used charts by choosing the filenames listed near the bottom of the File menu.

You can create new charts with the New command.

Shortcuts

Toolbar:
Keys: CTRL+O

See Also
File Open dialog box
1,2,3,4 command
New command
Window menu

File Open dialog box

The following options allow you to specify which file to open:

File Name

Type or select the filename you want to open. This box lists files with the extension you select in the List Files of Type box.

There is no need to type the extension. TreeChart automatically adds an appropriate extension (dependent on the file format you select) to the filename you type.

List Files of Type

This controls both the file types listed in the File Name list control, and the format that TreeChart expects to read.

Select the type of file you want to open:

TreeChart Files (*.TCF)   List: All files of type .TCF
Open: TreeChart-format file.
This is the normal format for TreeChart use, since it retains all chart information.

Template Files (*.TCT)   List: All files of type .TCT
Open: TreeChart-format Template file.
TreeChart-format files to be used as Templates normally have the filename extension .TCT to indicate they serve a different purpose.

Text Files (*.TXT)   List: All files of type .TXT
Open: Windows-format text file.
Unformatted text as saved by another program.

All Files (*.*)   List: All files
Open: TreeChart-format file.

Drives

Select the drive in which TreeChart stores the file that you want to open.

Directories

Select the directory in which TreeChart stores the file that you want to open.

Network...

Choose this button to connect to a network location, assigning it a new drive letter.

See Also
    Speeding up your work with Template Files
    Keys for working with dialog boxes

Close command (File menu)

Use this command to close the active chart.

If the chart has been changed since you last saved it, TreeChart prompts you to save the chart. If you close a chart without saving, you lose all changes made since the last time you saved it.

Shortcuts
Mouse: Double-click the chart's Control menu button.

Keys: CTRL+F4

Save command (File menu)

Use this command to save the active chart to its current name and directory.

When you save a chart for the first time, TreeChart prompts you for a file name and directory.

If you want to change the name and directory of an existing chart before you save it, choose the Save As command.

Shortcuts

Toolbar:

Keys: CTRL+S

See Also

Save As command
Save As dialog box

Save As command (File menu)

Use this command to save and name the active chart.

TreeChart prompts you for a file name and directory.

To save a chart with its existing name and directory, use the Save command.

See Also
    Save command
    Save As dialog box

🗎 File Save As dialog box

The following options allow you to specify the name and location of the file you're about to save:

File Name
Type a new filename to save a chart with a different name. A filename can contain up to eight characters and an extension of up to three characters.

There is no need to type the extension. TreeChart automatically adds an appropriate extension (dependent on the file format you select) to the filename you type.

Save File as Type
This controls both the file types listed in the File Name list control, and the format in which TreeChart saves the chart.

Select the format in which the chart should be saved:

TreeChart File (.TCF)
A TreeChart-format file.
Use this format to retain all chart information. This is the normal format for TreeChart use.

Template File (*.TCT)
A TreeChart-format Template file.
TreeChart-format files to be used as Templates normally have the filename extension .TCT to indicate they serve a different purpose.

Text & Commas (.TXT)
A Windows-format data file.
Suitable for use with a word processor or spreadsheet. Contains only Box text; no Layout or hierarchy information.

Text & Tabs (.TXT)
A Windows-format data file.
Suitable for use with a word processor or spreadsheet. Contains only Box text; no Layout or hierarchy information.

Outline Text (.TXT)
A Windows-format data file.
Similar to Text & Tabs, but containing Text Field names & Box hierarchy information, plus the name of a Layout (but not its settings).

Windows Metafile (.WMF)
A picture of the Current View of the chart, similar to as it would be printed.

Drives
Select the drive in which you want to store the chart.

Directories
Select the directory in which you want to store the chart.

Network...
Choose this button to connect to a network location, assigning it a new drive letter.

See Also
Speeding up your work with Template Files

<u>Keys for working with dialog boxes</u>

1, 2, 3, 4 command (File menu)

Use the numbers and filenames listed at the bottom of the File menu to open the last four charts you closed. Choose the number that corresponds with the chart you want to open.

Exit command (File menu)

Use this command to end your TreeChart session.

You can also use the Close command on the application Control menu.

TreeChart prompts you to save charts with unsaved changes.

Shortcuts
Mouse: Double-click the application's Control menu button.

Keys: ALT+F4

Toolbar command (View menu)

Use this command to display and hide the Toolbar, which includes buttons for some of the most commonly used commands in TreeChart.

A check mark appears next to the menu item when the Toolbar is displayed.

Shortcuts
    Keys: SHIFT+F2

See Also
    Toolbar

Toolbar

The Toolbar is displayed across the top of the application window, below the menu bar. The Toolbar provides quick mouse access to many commands used in TreeChart,

To hide or display the Toolbar, choose Toolbar from the View menu, or press SHIFT+F2.

In addition to the command buttons listed below, the Toolbar also enables the zoom factor of the current chart window to be altered, by means of a drop-down list.

Click   To

Create a New chart.

Open an existing chart.

Save the active chart or template with its current name.

Cut selected boxes from the chart and stores them on the clipboard.

Copy selected boxes to the clipboard.

Paste Below (insert) the contents of the clipboard below the Current Box.

Select all boxes.

Select Sub-Tree - Select the Current Box   and all boxes below it.

Select Level - Select all boxes at the level of the Current Box.

Select Subordinates - Select all boxes immediately below the Current Box.

Mark Boxes as exceptions to the rules.

Text Styles - Change the text style of any fields within any Layouts.

Define Layouts - Create, rename, edit, change use of a Layout.

View All boxes, by removing Focus and expanding all collapsed boxes.

⬛ <u>Focus</u> on the <u>Current Box</u> and all boxes below it; hide <u>boxes</u> on other branches.

⬛ <u>Collapse</u> selected boxes, hiding all <u>boxes</u> below them.

⬛ <u>Expand</u> selected boxes, revealing all <u>boxes</u> below them.

⬛ <u>Expand all</u> collapsed <u>boxes</u>.

⬛ <u>Print</u> the <u>Current View</u> of the active chart.

⬛ <u>Preview</u> printing.

⬛ Enter context-sensitive <u>Help mode</u>.

See Also
    <u>Zooming the Chart display</u>
    <u>Outlining</u>
    <u>Keys to access Toolbar buttons</u>

🔶

Status Bar command (View menu)

Use this command to display and hide the Status Bar, which describes the action to be executed by the selected menu item or depressed toolbar button, and keyboard latch state.

A check mark appears next to the menu item when the Status Bar is displayed.

Shortcuts
    Keys: CTRL+F2

See Also
    Status Bar

Status Bar

For Help, press F1   003 002 CAP NUM SCRL 0009 0002

The Status Bar is displayed at the bottom of the TreeChart window.

To display or hide the status bar, use the Status Bar command in the View menu, or press CTRL+F2.

The left area of the Status Bar describes actions of menu items as you use the arrow keys to navigate through menus. This area similarly shows messages that describe the actions of Toolbar buttons as you press them. If after viewing the description of the Toolbar button command you wish not to execute the command, then release the mouse button while the pointer is off the Toolbar button.

The left area of the status bar also advises when some longer duration actions are in progress, such as opening or saving files.

The right areas of the status bar indicates chart and keyboard status:

Indicator	Description
Total Levels	The number of <u>levels</u> in the active chart.
Current Level	The <u>level</u> of the <u>Current Box</u> in the active chart.
CAP	The Caps Lock key is latched down.
NUM	The Num Lock key is latched down.
SCRL	The Scroll Lock key is latched down.
Total boxes	The number of <u>boxes</u> in the active chart.
Hidden boxes	The number of boxes in the active chart hidden using outlining. If this indicator is not blank, the <u>Current View</u> is not the whole chart.

Some of the Status Bar fields reflect the conditions in the active chart. If you switch to a different
chart, the information is updated to reflect the conditions in the activated chart.

See Also
<u>Toolbar</u>
<u>Outlining</u>

Tile Horizontal (Window menu)

Moves and resizes all open chart windows, then arranges them side-by-side so they are all visible and none of them overlap.

Cascade command (Window menu)

Moves and resizes all open chart windows, then arranges them in an overlapped fashion.

Tile Vertical command (Window menu)

Moves and resizes all open chart windows, then arranges them stacked vertically so they are all visible and none of them overlap.

Arrange Icons command (Window menu)

Use this command to arrange the icons for minimized windows at the bottom of the main window.

If there is an open chart window at the bottom of the main window, then some or all of the icons may not be visible because they will be underneath this chart window.

1, 2, ... command (Window menu)

TreeChart displays a list of currently open chart windows at the bottom of the Window menu. A check mark appears in front of the chart name of the active window. Choose a chart from this list to make its window active.

Contents command (Help menu)

Use this command to display the opening screen of TreeChart's on-line Help.

From the opening screen, you can jump to step-by-step instructions for using TreeChart and various types of reference information.

Once you open Help, you can click the Contents button whenever you want to return to the opening screen.

Shortcuts
    Keys: CTRL+F1

See Also
    Getting Help in TreeChart

Using Help command (Help menu)

Use this command for instructions about using Help.

See Also
    Getting Help in TreeChart

Search For Help command (Help menu)

Use this command to search TreeChart's on-line Help for particular keywords.

The Search dialog box is displayed:

1 Type a keyword, or select one from the list of recognized keywords.

2 Choose Show Topics (or double-click on the keyword list) to show a list of topics with the selected keyword.

3 Select a topic from the list and choose Go To (or double-click the topic list) to go to the selected Help topic.

Once you open Help, you can click the Search button whenever you want to search the on-line Help by keyword.

See Also
Getting Help in TreeChart
Keys for working with dialog boxes

About command (Help menu)

Use this command to display the copyright notice and version number of your copy of TreeChart.

▣ Help Mode command

Use the Help mode command to obtain help on some portion of TreeChart.

When you choose this command, the cursor changes to ▧

Then click somewhere in the TreeChart window, such as a Toolbar button or a menu item.

The Help topic will be shown for the item you clicked.

Pressing ESC while the Help Mode cursor is displayed returns you to normal working without getting Help.

Shortcut

Toolbar: ▣
Keys: SHIFT+F1

See Also
Getting Help in TreeChart

◆

 Title Bar

The title bar is located along the top of a window. It contains the names of the application and the active chart.

To enlarge a window to full size, double-click on the title bar.

To move the window, drag the title bar. Note: You can also move dialog boxes by dragging their title bars.

A title bar may contain the following elements:
- Application Control-menu button
- Chart Control-menu button
- Maximize button
- Minimize button
- Name of the application
- Name of the active chart
- Restore button

See Also
    Keys for managing the TreeChart application window
    Keys for managing chart windows

Scroll bars

Displayed at the right and bottom edges of the chart window. The scroll boxes inside the scroll bars indicate your vertical and horizontal location in the chart. You can use the mouse to scroll to other parts of the chart.

See Also
Keys for scrolling a chart window

Size command (System menu)

Use this command to display a four-headed arrow so you can size the active window with the arrow keys.

After the pointer changes to the four-headed arrow:

1   Press one of the ARROW keys (left, right, up, or down arrow key) to move the pointer to the border you want to move.

2   Press an ARROW key to move the border.

3   Press ENTER when the window is the size you want.

Note: This command is unavailable if you maximize the window.

Shortcut
Mouse: Drag the size bars at the corners or edges of the window.

Move command (Control menu)

Use this command to display a four-headed arrow so you can move the active window or dialog box with the arrow keys.

Note: This command is unavailable if you maximize the window.

Shortcut
Mouse: Drag the title bar.

Minimize command (application Control menu)

Use this command to reduce the TreeChart window to an icon.

Shortcut

Mouse: Click the minimize icon on the title bar.

Maximize command (System menu)

Use this command to enlarge the active window to fill the available space.

Shortcut

    Mouse: Click the maximize icon on the title bar; or double-click the title bar.

Next Window command (chart Control menu)

Use this command to switch to the next open chart window.

TreeChart determines which window is next according to the order in which you opened the windows.

Shortcut
Keys: CTRL+F6

Previous Window command (chart Control menu)

Use this command to switch to the previous open chart window.

TreeChart determines which window is previous according to the order in which you opened the windows.

Shortcut
Keys: SHIFT+CTRL+F6

⬛ Close command (Control menus)

Use this command to close the active window or dialog box.

Shortcuts
    Mouse: Double-click the window's Control menu button.

    Keys: CTRL+F4 closes a chart window
                ALT+F4 closes the TreeChart window or a dialog box

Restore command (Control menu)

Use this command to return the active window to its size and position before you chose the Maximize or Minimize command.

▣ Switch to command (application Control menu)

Use this command to display a list of all open applications.

Use this "Task List" to switch to or close an application on the list:

Task List   Select the application you want to switch to or close.

Switch To   Makes the selected application active.

End Task   Closes the selected application.

Cancel   Closes the Task List box.

Cascade   Arranges open applications so they overlap and you can see each title
                       bar. This option does not affect applications reduced to icons.

Tile   Arranges open applications into windows that do not overlap. This
                       option does not affect applications reduced to icons.

Arrange Icons   Arranges the icons of all minimized applications across the bottom of
                       the screen.

Shortcut
   Keys: CTRL+ESC

See Also
   Keys for working with dialog boxes

◆

Choose Font dialog box

The following options allow you to specify a font and its style:

Font Select from the list of available fonts. TreeChart lists only those fonts that are available on the current printer and for screen use.

Style Select the font style. Options listed depend on the selected Font, but normally include options such as Regular, Bold and Italic.

Size Select the point size you require.

Strikeout Select this checkbox to enable text strikeout.

Underline Select this checkbox to enable text underlining.

Color Select a color for the text.

See Also
Keys for working with dialog boxes

Choose Color dialog box:

Box Fill Color
Box Border Color
Box Shadow Color
Connections Line Color
Background Color
Border Color
Border Shadow Color

This dialog allows you to choose a color. It is initially presented as a simple color-picker, offering up to 48 preset colors chips and 16 custom colors chips. You can expand the dialog to define a color different to the displayed preset and custom colors, or to change the custom colors.

The actual number of preset colors displayed is determined by the display driver. For example, a VGA driver displays 48 colors, and a monochrome display driver displays only 16.

TreeChart allows you to store 16 custom colors with each chart. These all default to white unless you define different colors in a Template File.

If the color you are changing matches one of the preset or custom colors, that color chip will be selected initially.

To select an existing color:

Click on the color chip, then click on OK.

To modify a custom color:

Click on the custom color chip, then choose the Define Custom Colors button. The dialog is expanded to enable you to define a new color. Change the color (see below), then choose the Add to Custom Colors button to update the custom color chip.

To define a custom color:

Click on Define Custom Colors. The dialog is expanded to enable you to define a new color.

Specify red, green, and blue (RGB) values by using the Red, Green, and Blue edit controls.

or

Specify hue, saturation, and luminosity (HSL) values by using the Hue, Sat, and Lum edit controls.

or

Click on the color spectrum control (at the upper-right of the dialog box) to select hue and saturation values; click on the luminosity control (the rectangle to the right of the spectrum control). This method is only available if you have a mouse.

Whichever technique you use...

The Color|Solid control displays the dithered and solid colors that correspond to your selection. (A dithered color is a color created by combining one or more pure or solid colors.) Note that most Windows devices are unable to use dithered colors to draw lines. Generally speaking, therefore, color use is:

<pre>
        Box Fill Color   Dithered
        Box Border Color   Solid
        Box Shadow Color   Dithered
        Connections Line Color   Solid
        Background Color   Dithered
        Border Color   Solid
        Border Shadow Color   Dithered
</pre>

Selecting OK after defining a color causes that color to be used; selecting Cancel leaves your chart unchanged (though the custom colors may have been changed). If you wish to add the newly-defined color to your table of custom colors, you must choose the Add to Custom Colors button before selecting OK or Cancel.

Color Models Used by the Choose Color Dialog Box

The Color dialog box uses two models for specifying colors: the RGB model and the HSL model. Colors you define are presented in both models, but you'll probably find things simpler if you define your colors using the model you feel most comfortable with.

RGB Color Model

The RGB (red, green, blue) model is used to designate colors for displays and other devices that emit light. Valid red, green, and blue values are in the range 0 through 255, with 0 indicating the minimum intensity and 255 indicating the maximum intensity. (With display devices, the color black results when the red, green, and blue values are set to 0--that is, with display technology, black is the absence of all colors.)

Following are eight example colors and their associated RGB values:

Color	RGB values
Red	255, 0, 0
Green	0, 255, 0
Blue	0, 0, 255
Cyan	0, 255, 255
Magenta	255, 0, 255
Yellow	255, 255, 0
White	255, 255, 255
Black	0, 0, 0

HSL Color Model

The Color dialog box provides controls for specifying HSL (hue, saturation, luminosity) values.

To the right of the dialog is a luminosity control. The square color spectrum has saturation on the vertical axis, and hue on the horizontal axis.

Note that after selecting a white (or near-white) color chip, for instance an unused Custom Color, the initial luminosity will be maximum, which would cause the color to be white

whatever the hue and saturation settings. If you find that changing hue or saturation has no effect on the Color|Solid control, you need to adjust the luminosity first.

The saturation and luminosity values are forced to be in the range 0 through 240 and the hue value is forced to be in the range 0 through 239.

See Also
    <u>Keys for working with dialog boxes</u>

Next Pane

<< Write application-specific help here. >>

Prev Pane

<< Write application-specific help here. >>

Working in a Chart Window

In a word processor, a document window allows you to manipulate text. In a drawing program, a document window allows you to manipulate picture elements (which might include lines, rectangles and text).

In a TreeChart chart window, you are manipulating <u>boxes</u>, not lines, rectangles or text. You can insert, delete and re-arrange boxes directly, but you can not directly select or change the text within boxes, the style of text or boxes, or how connecting lines are routed.

These attributes of boxes are changed by means of dialog boxes, each shown as a result of choosing a menu command or pressing a shortcut key. Whenever you change something, TreeChart automatically:

- ■ Re-calculates how large boxes need to be to contain the text
- ■ Re-positions boxes
- ■ Re-routes connecting lines

Although re-calculating the chart is automatic, you have a considerable degree of control over how the re-calculation is done.

See Also
<u>Boxes and Layouts</u>
<u>Chart Background Color</u>
<u>Inserting Boxes</u>
<u>Keyboard Shortcuts</u>
<u>Moving around a chart</u>
<u>Outlining</u>
<u>Selecting Boxes</u>
<u>Using a mouse in a Chart Window</u>
<u>Zooming the Chart Display</u>

No Help Available

No help is available for this area of the window.

No Help Available

No help is available for this message box.

Preferences command (File menu)

A number of options determining the operation of TreeChart can be specified by the user.

All options can be saved in an initialization file, and restored the next time the program is started.

Use this command to change the most commonly used options.

See Also
    Preferences dialog box

Preferences dialog box

A number of options determining the operation of TreeChart can be specified by the user. All options can be saved in an initialization file, and restored the next time the program is started. Most options can be set by means of this dialog.

Choosing the **OK** button completes the dialog, and any changes to the preferences will take effect from then on.

Choosing the **Cancel** button completes the dialog with preferences left unchanged.

Choosing the **Save** button causes the preferences as they appear in the dialog at that moment to be stored in the program's initialization file immediately.

Box Insertion   What the program does when you insert a new <u>box</u>

Initial Layout
The <u>Layout</u> a box initially uses is either the <u>Default Layout</u> for the <u>level</u> at which the box has been inserted or the same Layout as the box it was inserted next to.

Prompt for Text
Select this to automatically be prompted for box text.

Default Formats   The format used by automatically calculated fields if "(default)" is the format selected for the Layout being used.

Date/Time
Default format for <u>Border</u> field <date/time>

Counters
Default format for box fields <number>, <relative number> and <level>.

Outline
Default format for box field <outline number>

Clipboard   Optional formats copied to the <u>Clipboard</u>

Copy Text
Copy command copies text from the selected boxes

Copy Metafile
Copy command copies metafile picture of <u>Current View</u> plus <u>Border</u>

Template   <u>Template file</u> selection

File
Enter Template filename.

Browse
Choose from available Template Files

Miscellaneous   Other program preferences

Center Dialogs
Select to have dialogs shown in the center of the screen

Save Preferences on Exit
Select to have TreeChart preserve preference settings between sessions

See Also
Automatically calculated Border fields
Automatically calculated box fields
Exchanging information with other programs
Keys for working with dialog boxes
Speeding up your work with Template Files

Getting Help in TreeChart

Extensive on-line Help is always available to you when you are working with TreeChart. Help is
offered on a context-sensitive basis. This means that the help offered normally depends on what you were doing when you requested help.

Command Prompts

The first level of help offered is command prompts. Whenever you highlight a menu item or press (but don't release) a Toolbar button, a description of the command is displayed in the Status bar prompt field.

Online Help

TreeChart uses the standard Windows Help facility. Once the Help facility has been started, you are free to browse amongst topics, search for key words or phrases, add your own annotations to topics, or print topics. If you are unsure how to use Help, choose How to Use Help from the Help menu in either TreeChart or Help itself, or press F1 when you are in Help.

Help menu

The TreeChart Help menu enables you to start the Help facility with an overall contents presented. This can be useful if you are unsure what you need help on.

The Help menu also enables you to search the online Help for particular keywords.

Context-sensitive Help

Pressing F1 requests context-sensitive Help. The topic initially shown depends on what you were doing when your pressed F1; if you press F1 while a menu command is highlighted, rather than perform the command, help on the command is presented. If you press F1 while a dialog or message box is shown, help on that dialog or message box is presented.

Once you have started the Help facility, you are free to browse among topics as normal.

Help mode

Pressing SHIFT+F1 (or selecting the Help Mode button in the toolbar) stops normal TreeChart operation, and allows you to select something you'd like help on.

In this mode the cursor changes to ; just select a menu command or click the left mouse button over a part of the TreeChart window to select the help topic. If you select a command, rather than performing the command, help on the command is presented.

Pressing ESC leaves this mode without presenting help.

If you don't have a mouse, you are limited to selecting menu commands.

See Also
Help Contents command
Search for Help command

[Help Mode command](#)
[Toolbar](#)
[Status bar](#)
[Keys to Get Help](#)

◆

Select Template dialog box

The following options allow you to specify which Template File to use when you create a new chart or open a text-format file:

File Name
Type or select the name of the file you want to use as the Template. This box lists files with the extension you select in the List Files of Type box.

There is no need to type the extension. TreeChart automatically adds an appropriate extension (dependent on the file format you select) to the filename you type.

List Files of Type
This controls the file types listed in the File Name list control. You must choose a TreeChart-format file as a Template.

Drives
Select the drive in which TreeChart stores the file that you want to use as the Template.

Directories
Select the directory in which TreeChart stores the file that you want to use as the Template.

Network...
Choose this button to connect to a network location, assigning it a new drive letter.

See Also
Speeding up your work with Template Files
Keys for working with dialog boxes

▣ Print command (File menu)

Use this command to print a chart.

This command presents a Print dialog box, where you may specify the range of pages to be printed, the number of copies, the destination printer, and other printer setup options.

Note that the <u>Current View</u> (as defined by outlining selections) is printed, rather than the whole chart.

Shortcuts

Toolbar: 🖨

Keys: CTRL+P

See Also

<u>Outlining</u>
<u>Print dialog box</u>
<u>Printing charts</u>

◆

▣ Print dialog box

The following options allow you to specify how the chart should be printed:

Printer   This is the active printer.

Setup   Choose this button to select a different printer or other printer-specific options.

Print Range   Specify the pages you want to print:
   All   Prints the Current View of the active chart.
   Pages   Prints the range of pages you specify in the From and To boxes.

Copies   Specify the number of copies you want to print for the above page range.

Collate Copies   Prints copies in page number order, instead of separated multiple copies of each page.

Print Quality   Select the quality of the printing. Generally, lower quality printing takes less time to produce.

See Also
   Keys for working with dialog boxes
   Print Setup dialog box
   Printing charts

◆

Print Progress Dialog

The Printing dialog box is shown during the time that TreeChart is sending output to the printer.
The page number indicates the progress of the printing.

To abandon printing, choose **Cancel**.

Print Preview command (File menu)

Use this command to display the Current View of the active chart as it would appear when printed.

When you choose this command, the main window will be replaced with a print preview window in which one or two pages will be displayed in their printed format.

Shortcuts

Toolbar:

See Also

Print Preview Toolbar
Printing charts

Print Preview Toolbar

The Print Preview Toolbar offers you the following options:

Print Return from print preview to the main TreeChart window, then show the Print dialog box to start a print job.

Next Page Preview the next printed page.

Prev Page Preview the previous printed page.

One Page/Two Pages Show one or two pages of preview.

Zoom In See more detail, but less of the page.

Zoom Out See more of the page, but less detail.

Close Return from print preview to the main TreeChart window.

See Also
    Print dialog box

Print Setup command (File menu)

Use this command to select a printer, a printer connection or other printer-specific options.

See Also
Print Setup dialog box
Printing charts

Print Setup dialog box

The following options allow you to select the destination printer and its connection.

Printer   Select the printer you want to use. Choose the Default Printer; or choose the Specific Printer option and select one of the current installed printers shown in the box. You install printers and configure ports using the Windows Control Panel.

Orientation   Choose Portrait or Landscape.

Paper Size   Select the size of paper that the chart is to be printed on.

Paper Source   Some printers offer multiple trays for different paper sources. Specify the tray here.

Options   Displays a dialog box where you can make additional choices about printing, specific to the type of printer you have selected.

Network   Choose this button to connect to a network location, assigning it a new drive letter.

See Also
Keys for working with dialog boxes
Printing charts

Layout menu commands

The Layout menu offers the following commands:

Define Layouts	Define Layouts.
Text Styles	Make a series of changes to the text style of any group of fields within any group of Layouts.
Edit	Edit the Layout used by the Current Box.
Size	Modify the box size rules of the Layout used by the Current Box.
Spacing	Modify the spacing rules of the Layout used by the Current Box.
Use Default	Selected boxes use their Default Layouts.
Defaults	Define a default Layout for each level in the chart.
Delete Unused	Delete unused Layouts.

Define Layouts command (Layout menu)

Use this command to create a new <u>Layout</u>, rename a Layout or change which Layout is used by the selected <u>boxes</u>.

Shortcuts

Toolbar: L

Keys: CTRL+D

See Also

<u>Define Layouts dialog box</u>

Edit Layout command (Layout menu)

Use this command to edit the Layout used by the Current Box.

To edit other Layouts, use the Define Layouts command.

To simultaneously change the text styles of any group of fields within any group of Layouts, use the Text Styles command.

Shortcuts

Mouse: SHIFT+double click on box

Keys: SHIFT+ENTER

See Also

Define Layouts command
Edit Layout dialog box
Text Styles command

Box Size command (Layout menu)

Use this command to change the <u>box</u> size settings of the <u>Layout</u> used by the <u>Current Box</u>.

To change the box size settings of other Layouts, use the Define Layouts command.

Shortcuts
   Keys: F8

See Also
   <u>Box Size dialog box</u>
   <u>Define Layouts command</u>

Box Spacing command (Layout menu)

Use this command to change the <u>box</u> spacing settings of the <u>Layout</u> used by the <u>Current Box</u>.

To change the box spacing settings of other Layouts, use the Define Layouts command.

Shortcuts
Keys: SHIFT+F8

See Also
<u>Box Spacing dialog box</u>
<u>Define Layouts command</u>

Use Default Layouts command (Layout menu)

Use this command to instruct TreeChart to set all selected <u>boxes</u> to use the <u>Default Layout</u> defined for their <u>level</u> in the chart.

If no boxes are selected, the command changes the <u>Layout</u> used by the <u>Current Box</u>.

Default Layouts are defined using the Default Layouts command.

Shortcuts
Keys: CTRL+U

See Also
<u>Default Layouts command</u>
<u>Selecting Boxes</u>

Default Layouts command (Layout menu)

Use this command to change the Default Layouts.

See Also
Default Layouts dialog box

Delete Unused Layouts command (Layout menu)

Use this command to delete any Layouts you no longer need.

You cannot delete a Layout if it is used by any box or one of the Default Layouts.

See Also

Delete Layouts dialog box

Define Layouts dialog box

This dialog allows:

- New Layouts to be created
- Existing Layouts to be renamed or edited
- Different Layouts to be used for selected boxes
- Default Layouts to be changed
- Unused Layouts to be deleted

The dialog lists all existing Layouts, with the Layout used by the Current Box selected automatically.

Choose the **Close** button to complete the dialog and return to your chart window.

The dialog has a Close button rather than OK and Cancel since all of the operations available from this dialog are performed immediately, and cannot be undone. Most of these operations, however, are actually performed via secondary dialogs, and in these secondary dialogs you have the choice whether to proceed with or cancel changes you have made.

To create a new Layout

Newly created Layouts are always a copy of an existing Layout. When selecting an existing Layout, choose one that most closely matches how you'd like the new Layout to look. This will minimize the number of changes you need to make when you edit the new Layout.

1. Select an existing Layout
2. Enter the name of the new Layout in the New Name edit control.
3. Choose the New button

Layout names must be unique. If you try to create a new Layout with the same name as an existing Layout, TreeChart will refuse to accept the name.

The newly-created Layout will be added to the Layout list, and automatically selected, since you are almost certain to want to edit it.

Creating a new Layout takes immediate effect, and cannot be undone. If you make a mistake, you should either Rename or Delete the new Layout.

To edit a Layout

1. Select the Layout you wish to edit.
2. Choose the Edit button.

As an alternative, you can double-click on the Layout name.

To rename a Layout

1. Select the Layout you wish to rename
2. Enter the new name in the edit control.
3. Choose the Rename button

Layout names must be unique. If you try to rename a Layout with the same name as an

existing Layout, TreeChart will refuse to accept the name.

Renaming a Layout takes immediate effect, and cannot be undone. If you make a mistake, you should repeat the Rename operation.

To use a Layout for selected boxes

1 Select the boxes **before** you enter the Define Layouts dialog.
2 Select the Layout the selected boxes should use.
3 Choose the Use button

Using a different Layout takes immediate effect, and cannot be undone. If you make a mistake, you should repeat the Use operation.

To change the Default Layouts

▶ Choose the Defaults button.

To delete unused Layouts

▶ Choose the Delete button.

See Also
Default Layouts dialog
Delete Unused Layouts dialog
Edit Layout dialog
Keys for working with dialog boxes
Selecting Boxes

◆

▣ Edit Layout dialog box

This dialog allows you to change all settings of a single <u>Layout</u>.

The settings are divided into three basic groups:

Text options	The style, position and visibility of each Text Field
Box options	How the box itself is drawn
Connections options	How this box and its subordinates are positioned and connected

The sample uses the names of <u>Text Fields</u> to indicate their position and appearance.

After making   changes, choose **OK** to complete the dialog. The changes will automatically affect any <u>box</u> using this Layout.

Choose **Cancel** to complete the dialog, ignoring every change you have made.

See Also
<u>Box options</u>
<u>Connections options</u>
<u>Keys for working with dialog boxes</u>
<u>Text options</u>

◆

Edit Layout dialog box: Text Options

This group of controls allows you to change all options affecting how each <u>Text Field</u> appears for all <u>boxes</u> using this <u>Layout</u>.

Field

Choose the Text Field whose settings you want to change. As well as fields that you have defined, a number of automatically calculated fields are listed.

All remaining options affect the currently selected field.

Hide

Select this checkbox to hide the field.

Font

Choose this button to change the field's font, style, size or color.

Options

Choose this button to change the field's width or added text.

Horiz. Alignment

Use these controls to change the field's position and alignment within a line of text. Fields can be aligned with the left, the right or the center of the box. The **<** and **>** buttons nudge the field sideways.

Vertical Alignment

Use these controls to change the field's vertical alignment relative to the box. The **Up** and **Down** buttons nudge the field vertically, creating or merging lines as necessary.

See Also

<u>Automatically Calculated Fields</u>
<u>Choose Font dialog</u>
<u>Keys for working with dialog boxes</u>
<u>Text Field Options dialog</u>

Edit Layout dialog box: Box Options

This group of controls allows you to change all options affecting how the actual box appears for all boxes using this Layout.

Shape   Choose the basic shape of the box. This can be modified by choosing a fixed height to width ratio when specifying the box size.

Border Width   Choose the thickness of the box's border (including no border).

Border Color   Choose this button to change the border color.

Fill Color   Choose this color to change the box's interior color.

Transparent   Select this checkbox to ignore the Fill Color. The interior color will automatically be the same as whatever is behind the box.

Shadow   Choose the shadow thickness and direction (including no shadow).

Shadow Color   Choose this button to change the shadow color.

Size   Choose this button to change the margins between the text and the box border, or to specify a minimum box size or a fixed height to width ratio.

See Also
Box Size dialog
Choose Color dialog
Keys for working with dialog boxes

Edit Layout dialog box: Connections Options

This group of controls allows you to change all options affecting how all <u>boxes</u> using this <u>Layout</u> are positioned with their subordinates, and how connecting lines are drawn.

Style   Choose from a list of preset styles that determine both box positioning and line routing.

Child Align   Choose how subordinates will be aligned as they are positioned.

Spacing   Choose this button to change the spacing between boxes.

Line Width   Choose the thickness of connecting lines (including no lines).

Line Color   Choose this button to change the color of connecting lines.

See Also
<u>Box Spacing dialog</u>
<u>Choose Color dialog</u>
<u>Connection Style Options</u>
<u>Keys for working with dialog boxes</u>
<u>Subordinate Alignment Options</u>

Connection Style Options

The Layout used by a box determines how that box is positioned with, and connected to, its immediate subordinates. Normally, each subordinate is positioned and connected uniformly, though you can mark boxes as exceptions to the rules.

The most significant Layout setting for box positioning is chosen in the **Connections Style** drop-down list in the Edit Layout dialog. This list is pictorial, so most options should generally be obvious. The sample within the Edit Layout dialog reflects the current setting.

See Also
Aligning a box relative to its subordinates
Boxes that frame subordinate sub-trees
Edit Layout dialog box
Marking Boxes as Exceptions to the Rules
Positioning some subordinates across and some down
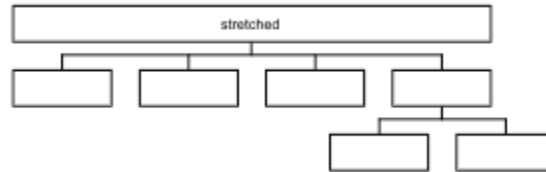Stretching a box to cover its subordinates

Stretching a box to cover its subordinates

Some of the options in the **Connections Style** drop-down list in the Edit Layout dialog have a box drawn wider than normal.

If one of these options is selected for a Layout, all boxes using that Layout will automatically be stretched to 'cover' their immediate subordinates.

For example:

Stretching boxes is done after calculating their minimum size and size matching; if a box is already bigger than its 'stretched' size, it will not be made smaller.

See Also
Edit Layout dialog box

Aligning a box relative to its subordinates

The options in the **Connections Style** drop-down list in the Edit Layout dialog indicate how a box using this Layout will be positioned relative to its subordinates after those subordinates have been positioned across the page, down the page or a mixture of the two.

The options can be summarized as follows:

- The parent connection point is the left edge of the left-most subordinate - Offset margin
- The parent center is the mid-point between the left-most and right-most subordinate edges
- The parent connection point is the right edge of the right-most subordinate + Offset margin
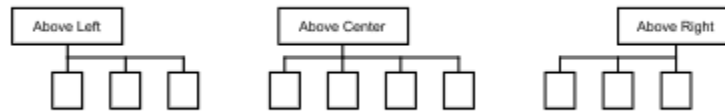
For example:
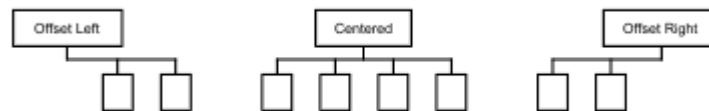
The following options are only available where subordinates are placed across:

- The parent center matches the center of left-most subordinate
- The parent center matches the center of subordinate nearest the mid-point
- The parent center matches the center of right-most subordinate

For example:

Options that make use of the Offset Distance margin are indicated with a **filled** box. Options that ignore the Offset Distance margin are indicated with a **hollow** box. The Offset Distance margin can be set using the Box Spacing dialog.

Not all styles offer all alignment options.

See Also
Box Spacing dialog
Edit Layout dialog box

Boxes that frame subordinate sub-trees

Some of the options in the **Connections Style** drop-down list in the Edit Layout dialog indicate a box surrounding, or framing, other boxes.

If one of these options is selected for a Layout, all boxes using that Layout will automatically be stretched and positioned to frame their subordinate sub-trees.

For example:
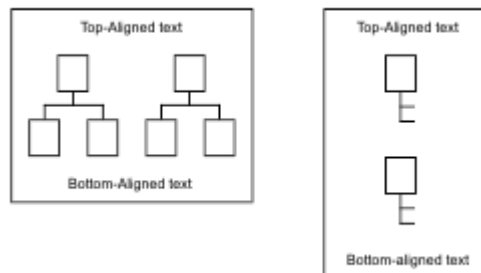
The subordinate sub-trees replace any vertically-centered text. Any vertically centered text is normally hidden, but will be shown if the box has no subordinates, or if its subordinates have been hidden by using outlining techniques.

The distinction between Box Size and Box Spacing is less obvious with these styles: the distances between subordinates are specified in the Box Spacing dialog, while the distances between the subordinates and the frame (& its text) are specified in the Box Size dialog.

You can specify a specific aspect ratio for a framing box, but not a minimum size. Surrounding boxes are also ignored when matching box sizes.

If you select a box which frames other boxes, it is highlighted slightly differently: instead of inverting the whole box, only the area outside the surrounded sub-trees is inverted.

If you use outlining to Focus on a framed sub-tree, you can choose whether TreeChart regards the frame color as the chart background color, or whether the Border background color is retained.

See Also
> Adding titles and a border
> Box Size dialog
> Box Spacing dialog
> Edit Layout dialog box
> Outlining

Positioning some subordinates across and some down

Some of the options in the **Connections Style** drop-down list in the Edit Layout dialog indicate some subordinates being placed across the page while some are placed down.

If one of these options is selected for a Layout, all boxes using that Layout will have their subordinates positioned dependent on whether or not they themselves have subordinates.

- Subordinates that have subordinates will be placed across the page
- Subordinates that don't have subordinates will be listed

For example:
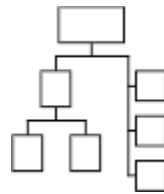
In an Organization Chart, managers would be positioned across, while non-managers would be listed. In a parts list, sub-assemblies would be positioned across, while individual components would be listed.

Using outlining techniques has no effect on this: a collapsed box still has subordinates, even though its subordinates are hidden.

The order of subordinates is significant for these styles, since only adjacent subordinates are formed into a list. To get the best results, you may need to swap subordinate positions.

If you find that subordinates have unexpectedly been grouped into two lists, its probably because you've marked one of the subordinates as an Assistant. To group them   into a single list, swap the position of the Assistant with another box.

Since these styles are hybrids of the basic across or down styles, they use both sets of distances to specify the spacing between boxes.

See Also
    Box Spacing dialog
    Edit Layout dialog box
    Outlining
    Swap command

Subordinate Alignment Options

The **Child Align** list in the Connections section of the Edit Layout dialog determines how subordinates of a box using this Layout are aligned as they positioned across or down the page.

There are six options: three align subordinate **boxes**, and three align subordinate **sub-trees**.

Subordinates placed Across

align subordinate tops	align subordinate centers	align subordinate bottoms
align sub-tree tops	align sub-tree centers	align sub-tree bottomS

Some Connections Styles list some subordinates, then place remaining subordinates across. Listed subordinates are always left-aligned, then treated as a single large box when aligning with the remaining subordinates.

Subordinates placed Down

align subordinate left edges	align subordinate centers	align subordinate right edges
align sub-tree left edges	align sub-tree centers	align sub-tree right edges

Box Size dialog box

The size of a <u>box</u> is determined by four factors:

- How much space is needed to show the text (with the selected font settings)
- The distance between the text fields and the box border
- Any Layout-dependent size rules
- Any chart-wide size matching rules

The first factor depends on the box text and the <u>Layout's</u> Text Options.

This dialog allows you to change the second and third factors.

See Also
<u>Edit Layout dialog box</u>
<u>Entering Measurements</u>
<u>Keys for working with dialog boxes</u>
<u>Layout-dependent size rules</u>
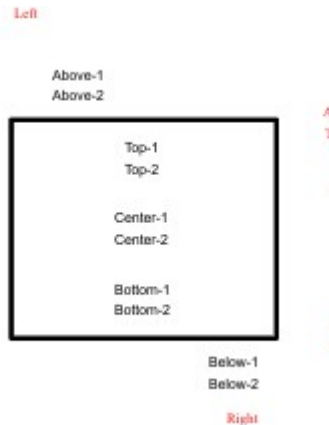<u>Match Box Sizes dialog box</u>
<u>The distance between text fields and the box border</u>

▣ Box Size dialog box: Text Margins

Boxes are always big enough to contain their associated text, then various margins are added before determining the actual box size. The meaning of the eight margins is illustrated by the following diagram:

Text fields having the same vertical alignment always have single line spacing.

The Above, Below, TopMiddle and BottomMiddle margins are only used if there are text fields above, below, top or bottom vertically aligned respectively. If this is not the case, these margins are totally ignored and have no effect on box size or spacing.

The Top, Bottom, Left and Right margins have, in a sense, two meanings:

In determining the initial box size, TreeChart calculates how much space is needed for the text, then **adds** these margins to determine an initial box size. If Box Size rules specify a minimum, or the chart-wide size matching rules require equal sized boxes, the box may then be made bigger.

When drawing a box, these margins are **subtracted** from the box size to determine where to place text. The overall effect, therefore, is that right-aligned text field (for example) will always be a fixed distance from the right edge of the box, irrespective of how wide the box is made to satisfy Size Matching rules.

Note that centered text (both vertically and horizontally) is centered within the region defined by the final box size minus the Top, Bottom, Left and Right margins. If your Top and Bottom margins aren't equal, or if your Left and Right margins aren't equal, the text will **not** be centered with respect to the box.

The checkboxes **Push Out Above** and **Push Out Below** determine the Left and Right margins for text fields above and below the box. Text fields inside the box are always inside the left and right sides of the box (the distance inside being determined by the Left and Right margins). Text fields above and below the box normally use the same Left and Right margins, but if the corresponding checkbox is selected instead regard the outer edge of the box as the left and right margins. The actual placement of text fields still depends on the horizontal alignment selected in the Edit Layout dialog.

See Also
    Entering Measurements

Box Size dialog box: Size Control

Box size calculation is by default automatic: box size being the space needed for the text plus margins. You can optionally specify a minimum height and/or width for a box.

Treat Minima as Fixed Ratio

Select this checkbox to cause boxes using this Layout to have a fixed height to width ratio. This checkbox is available only if you have specified both a minimum height and a minimum width.

Two examples:

To make rectangular box shapes square, or elliptical box shapes circular, select a minimum height and width of zero, and select Fixed Ratio. Since the minima specified are zero, there is effectively no minimum size to a box, but they will always be square (or circular) since the ratio is 1:1.

To make boxes have a 5x3 proportion, and have a minimum width of 2.5cm, select a minimum width of 2.5cm and a minimum height of 1.5cm, and select Fixed Ratio.

Selecting a fixed aspect ratio for a box affects the operation of any size-matching rules you may specify for the chart.

See Also
    Entering Measurements
    Keys for working with dialog boxes
    Match Box Sizes dialog box

■ Box Spacing dialog box

This dialog allows you to specify the various <u>Layout</u> factors affecting the spacing of <u>boxes</u>.

Up to six distances can be specified. The distances actually used depend on the arrangement of the box and its subordinates, as specified in the Connections **Style** list when editing the Layout used by the parent box.
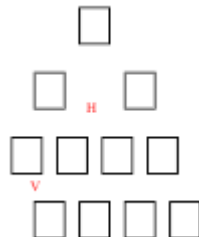
Minimum Distance between this box and subordinates

Used by all styles except those that frame subordinate sub-trees. When the parent is above its subordinates, this is the vertical distance between the bottom of the parent and the top of the subordinates. When the parent is beside its subordinates, this is the horizontal distance between the parent and its subordinates. For example:

Minimum Vertical and Horizontal Distances between subordinates

Used in all styles to specify how close together subordinate sub-trees should be positioned. Subordinate sub-trees are normally positioned so as to minimize the size of the chart. This can involve tucking sub-trees into or under gaps in other subordinate sub-trees. For Example:

 If you prefer isolated sub-trees, select the **Prevent Subordinate Sub-trees Overlapping** checkbox.

Offset Distance between this box and subordinates

Used only by certain styles (those with a solid fill to the parent box in the **Style** list). This indicates the horizontal offset from the point at which the connecting line leaves the parent box to the left or right edge of the subordinates. For example:

Vertical and Horizontal Stem Distances

Used where the connecting line has a common portion, with a stem drawn from the parent or to each subordinate. These indicate the length of the stem. Also used to position Assistants. For example:
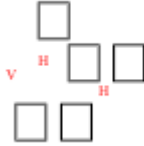
See Also

Default Layouts dialog box

This dialog allows you to specify which <u>Layout</u> is initially used by a newly-inserted <u>box</u>.   You can specify a different <u>Default Layout</u> for each <u>level</u> in your chart.

The Default Layout for a particular level is determined as a two-step process:

- If there is a specific Layout named as Default for this level, use it
- If there is no specific Layout named for this level, use a chart-wide default

The chart-wide default can be selected from the **Default** drop-down list.

Defaults for specific levels can be selected from the **level-specific** drop-down lists. If you don't want to name a specific Layout as default for a level, just select '(default)' in the list.

Only eight levels can have defaults specified, any boxes inserted at levels nine and above will always use the chart-wide default.

Choose the **OK** button to complete the dialog and implement the changes you have made. Choose the **Cancel** button to abandon the dialog, leaving your Default Layouts unchanged.

See Also
<u>Keys for marking boxes as exceptions to the rules</u>

Delete Unused Layouts dialog box

This dialog allows you to delete any Layouts you no longer need.

TreeChart will not allow you to delete Layouts that are being used. If a Layout is named as a Default Layout, it is considered to be in use, even if no box is actually using it.

All currently unused Layouts are listed. Select the Layout(s) you wish to delete.

Choose the **OK** button to complete the dialog, and delete all selected Layouts.

Choose the **Cancel** button to abandon the dialog, leaving layouts untouched.

See Also
    Keys for working with dialog boxes

Chart menu commands

The Chart menu offers the following commands:

Define Fields	Define box text fields.
Border Fields	Define Border text fields.
Border Text	Edit the Border text.
Border Layout	Change the Border Layout.
Border Margins	Change the Border margins.
Match Box Sizes	Change the box size-matching rules.
Page Setup	Change page margins and print style.

Define Text Fields command (Chart menu)

Use this command to add a new <u>text field</u> or rename or delete an existing text field. All <u>boxes</u> in a chart have the same number of text fields.

Shortcuts
    Keys: F3

See Also
    <u>Define Text Fields dialog box</u>

Define Border Text Fields command (Chart menu)

Use this command to add a new Border text field or rename or delete an existing Border text field. Border text fields are independent of box text fields.

Shortcuts
    Keys: SHIFT+F3

See Also
    Define Text Fields dialog box

Edit Border Text command (Chart menu)

Use this command to edit Border text.

Shortcuts
Mouse: double click on chart background
Keys: F7

See Also
Edit Text Fields dialog box

Border Layout command (Chart menu)

Use this command to change the appearance of the Border.

Shortcuts
Mouse: SHIFT+double click on chart background
Keys: SHIFT+F7

See Also
Edit Border Layout dialog box

Border Margins command (Chart menu)

Use this command to change the margins of the Border.

Shortcuts
Keys: CTRL+F7

See Also
Border Margins dialog box

Match Box Sizes command (Chart menu)

Use this command to change the rules for matching <u>box</u> sizes throughout the chart.

See Also
    <u>Match Box Sizes dialog box</u>

Page Setup command (Chart menu)

Use this command to change the margins used when printing, and whether TreeChart should print your chart at its correct size or shrink it to fit on a single page.

See Also
Page Setup dialog box

Define Text Fields / Define Border Text Fields dialog boxes

These dialog boxes allow you to change the underline text fields available within underline boxes or the underline Border.

You can build up a series of changes to the text fields, then proceed to alter the chart or cancel the changes.

To Rename an existing Field:

    1   Select the existing Field you wish to rename
    2   Enter the new name of the Field in the New Name control
    3   Choose the Rename button

The Rename button is only enabled when text has been entered in the New Name control, and one Field has been selected.

Field Names must be unique, and an error message is shown if you attempt to rename a Field to using Name which is already in use

To Add a new Field:

    1   Enter the name of the Field you wish to add in the New Name control
    2   Choose the Add button

The Add button is only enabled when text has been entered in the New Name control.

Field Names must be unique, and an error message is shown if you attempt to add a Field to using an Name which is already in use.

To Delete an existing Field:

    1   Select the Field (or Fields) you wish to delete
    2   Choose the Delete button

The Delete button is only enabled when at least one Field has been selected, and when no text has been entered into the New Name control.

Any number of Fields can be deleted in one operation by selecting a group of Field Names.

Completing the dialog:

After changing the Field definitions, choosing the **OK** button causes the changes to be applied to your chart.

Choosing the **Cancel** button cancels the dialog leaving your chart unchanged.

Box Text Fields:

For newly added Fields, all boxes and Layouts will have the Field added. Box text for this Field will initially be empty, and the Field will initially be hidden. You will need to edit each

Layout in which you want the Field to be visible.

For deleted Fields, all boxes and Layouts will have the Field deleted.

Border Text Fields:

For newly added Fields, text for this Field will initially be empty, and the Field will initially be visible. You will need to edit the Border Layout if the default font or position of newly added Border Fields is not as you wish.

See Also
   Keys for working with dialog boxes

Border Margins dialog box

This dialog allows you to specify the various Layout factors affecting the relative positioning of your chart and the Border text fields within the Border.

The Border Margins specify the minimum distance between your chart and the border, and the absolute distance between the border and the Border Text Fields.

When adding the Border to your chart, the margins are interpreted in two different ways:

When copying a picture of your chart to the Clipboard, or saving as a picture-format file, the Border (and Border Margins) are added to your chart. The picture will always be bigger than your chart; the extra area being the Border.

When printing your chart, the Page Margins are subtracted from the paper size to determine where the Border is. The Border Margins are then also subtracted to leave an area of paper available for the chart itself; what happens then depends on what printing style (poster or fit-
to-page) you have selected.

The meaning of the eight margins is illustrated by the following diagram:
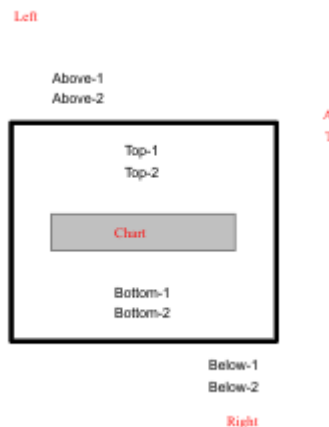
Text fields having the same vertical alignment always have single line spacing.

The Above, Below, TopMiddle and BottomMiddle margins are only used if there are text fields above, below, top or bottom vertically aligned respectively. If this is not the case, these margins are totally ignored.

The checkboxes **Push Out Above** and **Push Out Below** determine the Left and Right margins for text fields above and below the border. Text fields inside the border are always inside the left and right sides of the border (the distance inside being determined by the Left and Right margins). Text fields above and below the border normally use the same Left and Right margins, but if the corresponding checkbox is selected instead regard the outer edge of the border as the left and right margins. The actual placement of text fields still depends on the horizontal alignment selected in the Edit Border Layout dialog.

See Also
    Entering Measurements

<u>Keys for working with dialog boxes</u>

❖

Match Box Sizes dialog box

While the size of individual <u>boxes</u> is determined by the text that they contain, and <u>Layout</u> options like Fonts & Box Size, TreeChart also offers a variety of options for matching box sizes.

The height and width of boxes can be controlled independently; select one radio button from each group:

Independent	No further size corrections are applied.
Equal Throughout Chart	All Boxes will be drawn the same size.
Equal Within Levels	All Boxes at the same <u>level</u> will have the same size.
Equal Among Subordinates	All Boxes having the same Parent will have the same size.
Equal Using Layouts	All Boxes using the same Layout will have the same size.

You can also mark specific boxes to be ignored when matching heights or widths.

Wherever box sizes are changed, they are always increased to match the size of the largest box in the chosen category.

All boxes using the same Layout implicitly have the same height. The height of a box is determined by which fields are present, their font sizes and the box margins; it is not determined by the height of the actual text in the fields.

Deciding what boxes are compared

The radio buttons selecting the scope of the scan for size matching is useful when outlining facilities are in use. Matching box sizes within the Current View produces the most attractive individual charts. Matching box sizes throughout the whole chart is useful when you want consistent box sizes over a set of sub-charts prepared using outlining.

Select <u>Current View</u> to make boxes match the largest visible box.

Select Entire Chart to make boxes match the largest box in the entire chart.

Size matching rules and fixed-ratio boxes

You can specify a fixed height to width ratio for boxes using a Layout. This interferes with the strict appliance of size matching rules. In these circumstances the height of such a box will obey the size matching rules, and the width of the box is then re-calculated to obey the aspect ratio rule.

See Also
> <u>Keys for working with dialog boxes</u>
> <u>Marking Boxes as Exceptions to the Rules</u>
> <u>Outlining</u>

Page Setup dialog box

This dialog allows you to specify how TreeChart fits your chart and its <u>Border</u> to sheets of paper when printing.

Margins

>   The margins specify the distance from the edge of the paper to the center of the border.

>   Many printers have a small non-printable area at the edge of the paper. If the margins you choose would cause any part of the chart or Border not to be printed correctly with the selected printer, your margins will automatically be adjusted.

>   To change the margins between the border and the Border <u>text fields</u>, or between the border and your chart, use the Border Margins command.

Print Style

>   Select **Poster** to print your chart at its actual size. If the chart doesn't fit on a single sheet of paper, it will be printed on a series of sheets which you must then stick together.

>   Select **Overlapped Poster** to print your chart at its actual size. If the chart doesn't fit on a single sheet of paper, it will be printed on a series of sheets which you must then stick together. Where page breaks occur, ¼" of the chart is printed on both sheets.

>   Select **Fit To Page** to print your chart on a single sheet of paper. TreeChart automatically shrinks all box and font sizes in proportion to make the chart fit.

Chart Alignment

>   Choose where your chart will be printed within the area left after allowing for the Border.

See Also
<u>Border Margins command</u>
<u>Entering Measurements</u>
<u>Keys for working with dialog boxes</u>

Entering Measurements

A number of dialogs within TreeChart permit you to enter absolute measurements (margins, for example).   Entering measurements is handled in a consistent fashion:

Measurements can be presented in either metric or imperial units (centimetres or inches).

All dialogs containing measurements offer radio buttons to select the units the measurements are to be presented in. All measurements within a dialog are presented in the same units.

When a dialog containing measurements appears, the units will be as you last selected them. The units on program startup are read from an initialization file, and will be as you last selected them last time the program was run.   If the units cannot be read from the initialization file, the program uses the units specified by the International section of the Windows Control Panel.

The number of decimal places used when measurements are presented is as selected in the International section of the Windows Control Panel.

The decimal separator used when measurements are presented is as selected in the International section of the Windows Control Panel.   **This decimal separator must also be used when you enter measurements**.

You can enter measurements in a variety of units, for example:

   3 in   4.25"   2.1 cm 15mm 72pt (points)   16pi (pica)

Spaces between number and units are ignored. If no units are specified, the current presentation units (centimetres or inches) are assumed.

As an alternative to typing a new value, you can adjust the value by clicking on the increment / decrement controls associated with each measurement.

All measurements used by TreeChart must be in the range 0"-22" approximately. Attempting to enter values outside this range results in an error message when you change presentation units or complete the dialog.

▣ Chart Window Mouse Operations

TreeChart only uses the left button on the mouse, or the right button if the mouse buttons have been reversed by settings in the Windows Control Panel.

Quick summary of standard Windows mouse techniques:

Click	move the mouse press & release the left mouse button
Double-Click	move the mouse quickly press & release the left mouse button twice
Drag	move the mouse press (and hold down) the left mouse button move the mouse release the left mouse button to complete the operation

Click & double-click actions largely depend on whether or not the mouse pointer is over a box when you press the mouse button. When you're pointing at a box, the cursor changes:

⌐▷ pointer on a box

▷ pointer on the chart background

Inserting a new box:

You can insert a new box by dragging from an existing box:

1   Move the mouse over the box you want to insert above, below, left of or right of.

2   Press (and hold down) the left mouse button. This is called the Start Position.

3   Move the mouse. Depending on the distance from the Start Position, and the position relative to the Start Position, the mouse cursor will change:

⌐▷ Near Start Position - abandon insert

⇧ Above Start Position - Insert box above existing
         box

⬇ Below Start Position - Insert box below existing
         box

⬅□ Left of Start Position - Insert box left of existing
         box

□▷ Right of Start Position - Insert box right of existing
         box

4   Release the left mouse button to complete the operation, the action taken depends on the cursor that was shown when you release the button.

Summary of Chart Window Operations:

To	with the mouse
Move Insertion Point	click on box
Edit box Text Fields	double-click on box
Edit Layout used by box	SHIFT+double-click on box
Edit the Border Text	double-click on chart background
Edit the Border Layout	SHIFT+double-click on chart background
Insert a box in an empty chart or view	drag on chart background
Insert a box above existing box	drag up from existing box
Insert a box below existing box	drag down from existing box
Insert a box left of existing box	drag left from existing box
Insert a box right of existing box	drag right from existing box
Abandon box insertion	drag back to starting point
Toggle box selection status	CTRL+click on box
Clear Selections	click on chart background
Select a group of boxes	drag selection rectangle on chart background
Add a group of boxes to current selection	CTRL+drag selection rectangle on chart background

Note: The last two operations automatically scroll the chart window to keep the cursor visible.

See Also
Inserting Boxes

Edit Border Layout dialog box

This dialog allows you to change all Border Layout settings.

The settings are divided into two basic groups:

Text options   The style, position and visibility of each Text Field
Border options   How the border itself is drawn

The sample uses the names of Border Text Fields to indicate their position and appearance.

After making   changes, choose **OK** to complete the dialog and change the Border

Choose **Cancel** to complete the dialog, ignoring every change you have made.

See Also
  Border options
  Keys for working with dialog boxes
  Text options

Edit Border Layout dialog box: Text Options

This group of controls allows you to change all options affecting how Border text appears.

Field   Choose the Text Field whose settings you want to change. As well as fields that you have defined, a number of automatically calculated fields are listed.

All remaining options affect the currently selected field.

Hide   Select this checkbox to hide the field.

Font   Choose this button to change the field's font, style, size or color.

Options   Choose this button to change the field's width or added text.

Horiz. Alignment Use these controls to change the field's position and alignment within a line of text. Fields can be aligned with the left, the right or the center of the border. The **<** and **>** buttons nudge the field sideways.

Vertical Alignment Use these controls to change the field's vertical alignment relative to the border. The **Up** and **Down** buttons nudge the field vertically, creating or merging lines as necessary.

See Also
  Automatically Calculated Fields
  Choose Font dialog
  Keys for working with dialog boxes
  Text Field Options dialog

Edit Border Layout dialog box: Border Options

This group of controls allows you to change all options affecting how the actual <u>border</u> appears.

Shape   Choose the basic shape of the border.

Line Width   Choose the thickness of the border (including no border).

Border Color   Choose this button to change the border color.

Shadow   Choose the shadow thickness and direction (including no shadow).

Shadow Color   Choose this button to change the shadow color.

Margins   Choose this button to change the margins between the text and the border or between the border and the chart.

Background Color   Choose this color to change the chart background color.

Fixed Background Color   This checkbox determines how the chart background should be treated under certain outlining conditions. If this checkbox is selected, the Border Background color you choose will always be used. If this checkbox is clear, the chart background color may change as you change your outlining selections.

See Also
<u>Border Margins dialog</u>
<u>Choose Color dialog</u>
<u>Keys for working with dialog boxes</u>
<u>Outlining</u>
<u>The chart background color</u>

View menu commands

The View menu offers the following commands:

Toolbar	Show or hide the Toolbar.
Status Bar	Show or hide the Status Bar.
View All	Show all boxes, by removing Focus & expanding collapsed boxes.
Focus	Focus on Sub-Tree or the whole chart.
Collapse	Collapse selected boxes, making boxes below them hidden.
Expand	Expand selected boxes, revealing hidden boxes.
Expand All	Expand all collapsed boxes, revealing hidden boxes.
Zoom In	Zoom in, to magnify a portion of the chart.
Zoom Out	Zoom out, to see more of the chart.
Zoom Normal	Restore to 100% zoom.

View All command (View menu)

Use this command to remove all outlining selections you have made, and view the entire chart.

Focus is restored to the whole tree, and all collapsed <u>boxes</u> are expanded.

Shortcuts

Toolbar: △
Keys: CTRL+Q

See Also:
<u>Outlining</u>

Focus command (View menu)

Use this command to focus on one sub-tree of your chart, and hide all <u>boxes</u> not on that sub-tree.

This command switches between focusing on the whole tree and any sub-tree. When you are focused on a sub-tree, the menu item has a check mark beside it. Selecting this command again restores focus to the whole tree.

When focus is applied, the <u>Current Box</u>, and all boxes below it remain visible. All other boxes are hidden.

The Focus command can affect the chart background color.

Shortcuts

Toolbar:
Keys: CTRL+F

See Also:
<u>The Chart Background Color</u>
<u>Outlining</u>

Collapse command (View menu)

Use this command to hide some of the detail of your chart. The command collapses the selected <u>boxes</u>; all boxes below these become hidden.

Shortcuts

Toolbar:
Keys: CTRL+K

See Also:
<u>Outlining</u>
<u>Selecting Boxes</u>

Expand command (View menu)

Use this command to reveal <u>boxes</u> hidden using the Collapse command. This command expands the selected boxes; all boxes below these are revealed.

You may have previously collapsed some of the revealed boxes. These boxes will remain collapsed unless you expand them. To expand all boxes use the Expand All command.

Shortcuts

Toolbar: △
Keys: CTRL+E

See Also:
Collapse command
Expand All command
Outlining
Selecting Boxes

Expand All command (View menu)

Use this command to reveal <u>boxes</u> hidden using the Collapse command. This command expands all collapsed boxes, revealing all hidden boxes.

Shortcuts

Toolbar:

Keys: CTRL+SHIFT+E

See Also:

<u>Collapse command</u>
<u>Outlining</u>

![icon] Outlining

Outlining is the technique offered by more sophisticated word processors to allow you to hide parts of a document, and concentrate on other parts.

For example, this describes the structure of a simple document:

```
The Document
        Chapter 1
                Section 1
                Section 2
                        Sub-section 1
                        Sub-section 2
        Chapter 2
                Section 1
                Section 2
```

Showing the document in this form already illustrates one aspect of outlining: hiding the actual text within each section or sub-section, and just concentrating on the section headings. This will have been achieved by using a command to collapse the sections.

If you wanted to edit the text within Chapter 1, Section 1, this heading would be expanded to show the text beneath it.

Another example of outlining that you may be familiar with is the directory windows of the Windows File Manager.

TreeChart offers outlining to perform much the same function: hiding some aspects of your chart, and allowing you to better concentrate on other aspects.

The outlining selections you make define the Current View of the chart.

The example document we described above could be shown in TreeChart terms like this:
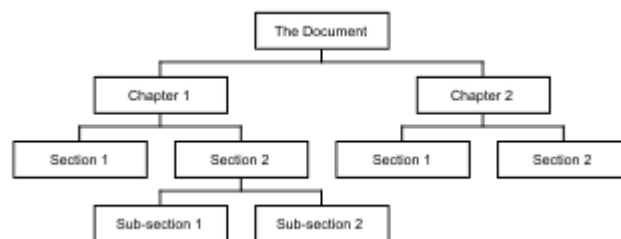
If you just wanted to have a 'top-level' view of the chart, you could select the two 'Chapter' boxes, then use the Collapse command. The chart would be redrawn like this:
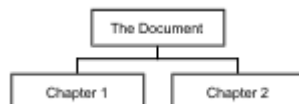
Notice that when recalculating the box positions, the 'Chapter' boxes are now placed much closer together. Box placement depends only on visible boxes, so that the chart looks attractive whatever outlining selections you have chosen.

In an Organization Chart, Collapse is useful for viewing management, and hiding other staff.

You reveal whatevers hidden below collapsed boxes by expanding them. Two commands do this: the Expand command expands the selected boxes, while the Expand All command expands all collapsed boxes.

As well as hiding things below a box, TreeChart also allows you to hide things above a box. Returning to the original chart, we can focus our attention on Chapter 1 by making the 'Chapter 1' box the <u>Current Box</u>, then using the Focus command. The chart would be redrawn like this:
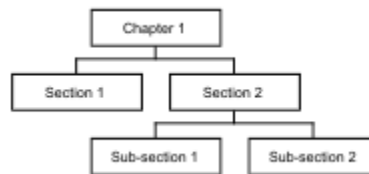

In saying that this hides all boxes above the Current Box, we're being a bit inaccurate; what the Focus command really does is leave only the Current Box and all boxes below it visible; all boxes above it or on different branches are hidden.

In an Organization Chart, Focus is useful for viewing just one department, and hiding all others.

You can only focus on one box at a time. To remove the focus, and reveal the true top-level box, choose the command again.

If the box you have focused on 'disappears', the focus is automatically moved to the parent of the box that had the focus. This is done to ensure that you can always see the context you're working in. A box can 'disappear' in two ways: by being deleted, or if you collapse a box marked as Invisible.

The Focus & Collapse commands can be combined. For example, you might wish to focus on Chapter 1, and then collapse the Section boxes to give you this:
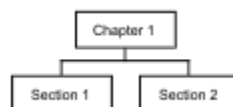
The View All command removes focus and expands all collapsed boxes.

See Also:
    <u>Collapse command</u>
    <u>Expand command</u>
    <u>Expand All command</u>
    <u>Focus command</u>
    <u>Keys for hiding boxes (outlining)</u>
    <u>The Chart Background Color</u>
    <u>View All command</u>

Zoom In command (View menu)

Use this command to increase the zoom factor used when your chart is displayed.

Zoom factors greater than 100% cause <u>boxes</u> to be displayed larger than when they are printed, making small text sizes easier to read.

This command is ignored if the zoom factor is already at its maximum value.

Shortcuts
    Keys: +

See Also:
    <u>The Toolbar</u>
    <u>Zooming the Chart Display</u>

Zoom Out command (View menu)

Use this command to decrease the zoom factor used when your chart is displayed.

Zoom factors less than 100% cause <u>boxes</u> to be displayed smaller than when they are printed, allowing you to see more boxes at once, though text becomes unreadable.

This command is ignored if the zoom factor is already at its minimum value.

Shortcuts
Keys: -

See Also:
<u>The Toolbar</u>
<u>Zooming the Chart Display</u>

Zoom Normal command (View menu)

Use this command to restore the zoom factor to 100%. The displayed size of <u>boxes</u> will now match the printed size.

Shortcuts
Keys: =

See Also:
<u>The Toolbar</u>
<u>Zooming the Chart Display</u>

Zooming the Chart Display

TreeChart normally displays your chart at full size. You can elect to display the chart with various
scaling or zoom factors, to see more of the structure of the chart (but with illegible text) or more
clearly see small text sizes (but fewer <u>boxes</u>).

All methods for moving around and editing your chart are available whatever the zoom factor.

The current zoom factor (for the active chart) is indicated on the Toolbar.

To restore normal (100%) zoom:

Use the Zoom Normal command.

To set a specific zoom factor:

A specific zoom factor can only be set if the Toolbar is shown. To set a specific zoom factor, open the drop-down list on the Toolbar, and select the desired zoom factor. Keyboard users can access this list:

F2	Opens the list
arrow keys	change selection
ENTER	confirm selection (closes list)

To increment or decrement the zoom factor:

Use the Zoom In or Out commands.

These commands move to the next preset zoom factor. They are ignored if you are already displaying the chart at maximum / minimum zoom.

See Also:
<u>The Toolbar</u>
<u>Zoom In command</u>
<u>Zoom Out command</u>
<u>Zoom Normal command</u>

The Chart Background Color

The Background color you select for the Border is the background color for the chart.

To assist you in selecting complimentary colors for the boxes, lines and text in your chart, this background color is used for the chart window, and when changing Layout settings.

Some of the box positioning styles cause boxes to be framed by other boxes. The background color of the framed boxes is therefore the Fill color of the framing box.

If you use outlining techniques to Focus on a framed box, and hide all boxes above it and on different branches, you might want to temporarily adopt the framing box's Fill color as the chart background color, rather than continue to use the Border Background color. This option is a Border Layout setting.

Subject to differing color capabilities of the various devices, the colors you see in the chart window are the colors that will be used if you copy a picture to the Clipboard, save in picture format or print the chart.

See Also:
　　Outlining
　　Border Layout command

Edit menu commands

The Edit menu offers the following commands:

Undo	Undo the last insertion or deletion.
Cut	Deletes boxes from the chart and moves them to the clipboard.
Copy	Copies boxes from the chart to the clipboard.
Paste Below	Pastes boxes from the clipboard into the chart below the Current Box.
Paste Left	Pastes boxes from the clipboard into the chart to the left of the Current Box.
Paste Right	Pastes boxes from the clipboard into the chart to the right of the Current Box.
Insert Above	Insert a new box above the Current Box.
Insert Below	Insert a new box below the Current Box.
Insert Left	Insert a new box to the left of the Current Box.
Insert Right	Insert a new box to the right of the Current Box.
Box Text	Edit the text within the Current Box.
Mark Boxes	Change the markers of the selected boxes.
Delete	Delete selected boxes.
Swap	Swaps the positions of two boxes.
Select All	Selects all boxes.
Select Sub-Tree	Selects the Current Box and all boxes below it.
Select Level	Selects all boxes at the same level as the Current Box.
Select Subordinates	Selects all boxes immediately below the Current Box.
Select Marked	Selects boxes dependent on their marker settings.
Clear Selections	De-selects all selected boxes.

Undo command (Edit menu)

Use this command to reverse the last editing action, if possible. The name of the command changes, depending on what the last action was.

You can only undo box insertions and box deletions.

The Undo command is disabled if you cannot reverse your last action.

Shortcuts
Keys: CTRL+Z or ALT+BACKSPACE

Cut command (Edit menu)

Use this command to remove the currently selected boxes from the chart and put them on the clipboard.   If no boxes are selected, the Current Box is cut.

Cutting data to the clipboard replaces the contents previously stored there.

If you make a mistake, you can undo the box deletion caused by this command.

Shortcuts
Toolbar:
Keys: CTRL+X or SHIFT+DEL

See Also
Exchanging information between charts
Exchanging information with other programs
Selecting Boxes
Undo command

Copy command (Edit menu)

Use this command to copy selected <u>boxes</u> onto the <u>clipboard</u>.   If no boxes are selected, the <u>Current Box</u> is copied.

Copying data to the clipboard replaces the contents previously stored there.

TreeChart can optionally also copy box text or a picture to the clipboard.

Shortcuts

Toolbar:
Keys: CTRL+C or CTRL+INS

See Also
<u>Copying text from TreeChart into another program</u>
<u>Copying pictures from TreeChart into another program</u>
<u>Exchanging information between charts</u>
<u>Preferences dialog</u>
<u>Selecting Boxes</u>

Paste Below command (Edit menu)

Use this command to insert a copy of the <u>clipboard</u> contents below the <u>Current Box</u>.

If you Paste below a box that has subordinates, all those subordinates are 'demoted' and become
subordinates of the pasted box. In Organization Chart terms, pasting a box below a manager creates a new middle manager position.

If you make a mistake, you can undo this command.

This command is unavailable if the clipboard is empty.

Shortcuts
Toolbar:
Keys: CTRL+V or SHIFT+INS

See Also
<u>Exchanging information between charts</u>
<u>Pasting text from another program into TreeChart</u>
<u>Undo command</u>

Paste Left command (Edit menu)

Use this command to insert a copy of the clipboard contents to the left of the Current Box.

If you make a mistake, you can undo this command.

This command is unavailable if the clipboard is empty.

Shortcuts
    Keys: CTRL+L

See Also
    Exchanging information between charts
    Pasting text from another program into TreeChart
    Undo command

Paste Right command (Edit menu)

Use this command to insert a copy of the clipboard contents to the right of the Current Box.

If you make a mistake, you can undo this command.

This command is unavailable if the clipboard is empty.

Shortcuts
Keys: CTRL+R

See Also
Exchanging information between charts
Pasting text from another program into TreeChart
Undo command

Insert Above command (Edit menu)

Use this command to create a new <u>box</u>, placing it immediately above the <u>Current Box</u>.

The Current Box and all boxes below it will be moved down one level.

If you make a mistake, you can undo this command.

Shortcuts
    Mouse: drag up from Current Box
    Keys: ALT+UP

See Also
    <u>Initial and Default Layouts</u>
    <u>Inserting boxes</u>
    <u>Undo command</u>

Insert Below command (Edit menu)

Use this command to create a new box, placing it immediately below the Current Box.

If you insert a new box below a box that has subordinates, all those subordinates are 'demoted' and become subordinates of the newly-inserted box. In Organization Chart terms, inserting a box below a manager creates a new middle manager position.

If you make a mistake, you can undo this command.

Shortcuts
Mouse: drag down from Current Box
Keys: ALT+DOWN

See Also
Initial and Default Layouts
Inserting boxes
Undo command

![icon] Insert Left command (Edit menu)

Use this command to create a new box, placing it immediately to the left of the Current Box.

If you make a mistake, you can undo this command.

Shortcuts
    Mouse: drag left from Current Box
    Keys: ALT+LEFT

See Also
    Initial and Default Layouts
    Inserting boxes
    Undo command

Insert Right command (Edit menu)

Use this command to create a new <u>box</u>, placing it immediately to the right of the <u>Current Box</u>.

If you make a mistake, you can undo this command.

Shortcuts
    Mouse: drag right from Current Box
    Keys: ALT+RIGHT

See Also
    <u>Initial and Default Layouts</u>
    <u>Inserting boxes</u>
    <u>Undo command</u>

Box Text command (Edit menu)

Use this command to edit the text in the Current Box.

Shortcuts
  Mouse: double click on box
  Keys: ENTER

See Also
  Edit Text dialog box

Delete Boxes command (Edit menu)

Use this command to delete the selected boxes. If no boxes are selected, the Current Box is deleted.

If you delete a box that has subordinates, but don't delete the subordinates themselves, the subordinates are 'promoted'.

If you make a mistake, you can undo this command.

Shortcuts
Keys: DEL

See Also
Selecting Boxes
Undo command

Swap Positions command (Edit menu)

Use this command to swap the positions of two sub-trees.

This command is only available if two <u>boxes</u> are selected, and they have the same parent.

Shortcuts
    Keys: CTRL+W

See Also
    <u>Selecting Boxes</u>

Select All command (Edit menu)

Use this command to select all boxes in the Current View.

Shortcuts
Toolbar:
Keys: CTRL+A

See Also
Selecting Boxes

Select Sub-Tree command (Edit menu)

Use this command to select the Current Box, and all visible boxes below it.

Shortcuts

Toolbar:
Keys: CTRL+T

See Also
Selecting Boxes

Select Level command (Edit menu)

Use this command to select all visible <u>boxes</u> at the same <u>level</u> as the <u>Current Box</u>.

Shortcuts

Toolbar:
Keys: CTRL+H

See Also
<u>Selecting Boxes</u>

Select Subordinates command (Edit menu)

Use this command to select all underline boxes immediately below the Current Box.

Shortcuts

Toolbar:
Keys: CTRL+I

See Also

Selecting Boxes

Clear Selections command (Edit menu)

Use this command to de-select all selected underline boxes.

Shortcuts
Mouse: click on chart when **not** over a box
Keys: CTRL+G

See Also
Selecting Boxes

Edit Text / Edit Border Text dialog boxes

Text Fields, and their associated text are presented as a table. The number of fields, and their names, will depend on what fields you have defined for the boxes or the Border of your chart.

Only the associated text can be changed, not the field names or the number of fields. To add, delete or rename text fields, use the Define Fields or Define Border Fields command.

Movement around the table is similar to a spreadsheet. Note that the TAB key circulates the focus between the table, the OK button and the Cancel button. To move around the table, use the arrow keys (or, with the mouse, click on a cell).

Individual table cells act like normal single line edit controls. One consequence of this is that you can only copy and paste individual Fields (not a group of Fields).

To	Press
Copy selected text	CTRL+C
Cut selected text	CTRL+X
Paste text	CTRL+V

Pasting text from other programs can result in TAB characters being placed in your text. These are shown in this dialog as a vertical bar, indicating a non-displayable character. When you complete the dialog, TreeChart converts each TAB to a single space.

See Also
Define Fields command
Define Border Fields command

Selecting Boxes

Some TreeChart commands (for example, edit text) can only meaningfully operate on one box at a time. These commands always work on the Current Box.

Other TreeChart commands (for example, delete boxes) can work on a set of boxes simultaneously. These commands will work on the selected boxes, or if no boxes are selected the Current Box.

Selected boxes are shown on the display by being drawn inverted; white boxes becoming black, for instance.

There are four basic methods of selecting boxes:

- Individually
- By region
- By position
- Depending on their marker settings

By combining these techniques, an arbitrary set of selected boxes can quickly be defined.

Selecting Individual boxes

To toggle the selection status of the Current Box

Mouse   Keyboard

Move the cursor over the box.   Press SPACE
Click the left mouse button
while holding down CTRL

This is just like performing multiple selections in a list box (for example, selecting a group of files in Windows File Manager).

Selecting a group of boxes by region

This can only be done with a mouse. If you press (and hold down) the left mouse button while not
over a box, then start to drag, a dotted rectangle will be drawn to indicate the selection region.
Releasing the mouse button completes the operation. All boxes entirely within the selection region will be selected. If you move the mouse cursor outside of you chart window during this operation, the window automatically scrolls.

The first box in the selection region becomes the Current Box.

If you hold down CTRL as you commence the selection, current selections are retained, and boxes within the selection region are added to the set of selected boxes. If you do not hold down CTRL, current selections are cleared before selecting the boxes within the selection region.

Selecting a group of boxes by position.

Four menu / toolbar commands let you select a group of boxes:

Toolbar   **Edit Menu**

 Select All   Select all boxes.

 Select Level   Select all boxes at the same <u>level</u> as the Current Box.

 Select Subord   Select all boxes directly below the Current Box.

 Select Sub-   Select Current Box, and all boxes below it.
           Tree

These commands always add more selections. To remove any existing selections before selecting a new group,   use the Clear Selections command.

Selecting a group of boxes depending on their marker settings

TreeChart allows you to mark boxes as exceptions to the rules. With the Select Marked command, you can select boxes depending on their marker settings.

See Also
 <u>Clear Selections command</u>
 <u>Keys for selecting boxes</u>
 <u>Marking Boxes as exceptions to the rules</u>
 <u>Select Marked command</u>

Moving around a chart

Working with chart windows is much like working with a document window in any Windows application.

The caret indicates the Current Box.

Moving the caret is much like the Insertion Point in a word processor:

With a mouse: click on a box.

Keyboard: See Keys for moving the caret.

If you are using a mouse, a number of operations automatically make the box you're pointing at the Current Box as part of the operation.

If the Current Box is changed, the chart window is automatically scrolled to make the Current Box visible.

See also Keys for scrolling a chart window for a summary of keyboard shortcuts for scrolling a chart window without moving the caret.

Exchanging information between charts

When TreeChart copies (or cuts) <u>boxes</u> to the <u>Clipboard</u>, the information it saves in the Clipboard includes the name of the <u>Layout</u> used by each box, but not the actual Layout settings.

It works this way because its the most natural: if a number of boxes use the same Layout, pasted boxes will use exactly the same Layouts as they used before they were cut. If you happen to change the Layout settings after the cut command, but before the paste command, the pasted boxes will automatically use the new Layout settings (not the ones in force when the cut command was performed).

If you copy boxes from one chart to another, the Layouts used by these boxes might not be defined in the chart they're being pasted into. Alternatively, they might be defined, but with totally different settings.

What TreeChart does when pasting boxes is this: if a box uses a Layout whose name is defined in this chart, the box will use that Layout, otherwise it will use the <u>Default Layout</u> for the <u>level</u> it has been inserted at.

This means that if you copy boxes from one chart to another, the pasted boxes will have the style / appearance appropriate for the chart being pasted into rather than the chart they were copied from.

At present, TreeChart offers no means to copy Layouts between charts.

◆

Definitions

Border
Box
Caret
Clipboard
Current Box
Current View
Default Layout
Layout
Level
Template File
Text Field

Clipboard

A temporary storage area for cut or copied information. You can paste the contents of the Clipboard into another chart or into a document in another Windows application.

Caret

In a word processor, the current position for text entry is indicated by a caret. With graphical
information, a simple caret isn't quite sufficient. In TreeChart, the caret is a thin red line
which
surrounds a box. The surrounded box is called the Current Box. You move the caret to choose
a different Current Box.

Box

A box is TreeChart's term for a record in a hierarchically structured database.

Like a database record, the text that appears within a box is divided into fields. Like a database, all boxes have the same number of fields. When creating a chart you decide how many fields you need. You don't have to get this perfect before starting a chart: you can add or delete fields at any time.

Having constructed a hierarchy of boxes, the way the information is illustrated is determined by the Layout settings you choose.

Current Box

In a word processor, the current position for text entry is indicated by a caret. With graphical
information, a simple caret isn't quite sufficient. In TreeChart, the caret is a thin red line
which
surrounds a box. The surrounded box is called the Current Box.

Any command that can only operate on one box is always performed on the Current Box. Any
command that could operate on a number of boxes simultaneously is performed on the
selected boxes, or if no boxes are selected, the Current Box.

Layout

A style guide; it determines how boxes appear, and how they are connected to their subordinates.

Layouts are similar to Style Guides found in more sophisticated word processors, and can greatly
assist you in achieving a consistent appearance to your charts. Once you've defined a Layout, you can use it as often as you like.

You can define any number of Layouts. Each must be assigned a unique name so that it can be referred to while preparing the chart. Every box in a chart uses one of the Layouts you have defined. When you change the settings of a Layout, it automatically affects every box using that Layout.

Border

When your chart is to be presented, a Border is added. The Border acts as a frame around your chart, and can add titles, headers, footers or any other text fields that you need. The Border frames your chart not only when printing, but also when copying the chart to the Clipboard as a picture, and when saving a file in picture format.

Like a box, the Border can have any number of Text Fields, and it uses a Layout. The Text Fields defined for the Border are different from those defined for boxes.

Default Layout

The Layout a newly-inserted box can initially use. You can define a different Default Layout for each level in your chart.

Text Field

Text associated with a box is stored as fields. Each field has a name. All boxes within a chart have the same number of fields though whether a particular field is displayed for a particular box is defined by the Layout the box is using, as is its style (font, size, color) and the relative order and position of fields.

TreeChart defaults to defining two box fields: Name and Position.

You can add, delete or rename fields at any time. You can also change the defaults by using a Template File.

Template File

A Template File is simply a chart that acts as a starting point when you create a new chart. A Template contains:

- A definition of which text fields are available
- A set of Layouts
- Other chart settings

Template Files are normally given a filename extension of **.TCT**.

TreeChart only recognizes one Template File at a time, but you can switch Templates to any TreeChart-format file whenever you wish.

The Template File is also used if you open a text-format file. This can greatly reduce the time to
prepare a chart when importing text from other programs.

Level

The rank of a box within the hierarchy. The box at the top of the hierarchy is at level 1; subordinates to this box are at level 2, and so on.

Level numbers are not affected by any outlining selections you make: if a box is at level 5 in the full chart, it is also at level 5 if you Focus on it to make it the top-most visible box.

When you insert a new box, the Layout it initially uses can be defined by the Default Layout for the level it has been inserted at.

You can select all boxes at a certain level, and match box sizes within levels.

Current View

The outlining selections you make define the Current View of the chart.

Wherever sensible, commands you select are always performed on the Current View. For example, the Select All command selects all boxes in the Current View.

The only operations that are always performed on the whole chart, rather than the Current View are:

- Saving the chart (in TreeChart format or Text format)
- Adding, deleting or renaming a box Text Field

Working with the Current View rather than the whole chart is particularly useful when you need to output the finished chart: if you print, copy a picture to the Clipboard or save a picture-format file, it is always the Current View.

Keyboard shortcuts

You can use keyboard shortcuts for commands and actions. Each shortcut key consists of a letter, symbol or function key, often pressed in combination with the CTRL, SHIFT and ALT keys. Choose any of the topics from the following list of categories to see which key combinations can be used to speed up common operations.

See also

Keys to Get Help
Keys for moving the caret
Keys for scrolling a chart window
Keys for selecting boxes
Keys for adding, removing and re-arranging boxes
Keys for changing box text
Keys for editing the Layout used by the Current Box
Keys for changing which Layout is used by selected boxes
Keys for marking boxes as exceptions to the rule
Keys for changing the Border
Keys for hiding boxes (outlining)
Keys for changing the scale at which a chart is displayed
Keys for managing the TreeChart application window
Keys for managing chart windows
Keys for choosing menus and commands
Keys for working with dialog boxes
Keys to access Toolbar buttons

Keys to Get Help

Use the following keyboard shortcuts to get help on working with TreeChart. TreeChart uses the standard Windows Help facility.

To	Press
Get Help (context dependent)	F1
Enter Help mode	SHIFT+F1
Leave Help mode without getting Help	ESC
See Help contents	CTRL+F1

Keys for moving the caret

Use the following keyboard shortcuts to move the caret.

Moving the caret changes which box is the Current Box. If the new Current Box is not fully on-screen, the chart window is automatically scrolled to make it visible.

Note that all keys for moving the caret require Scroll Lock mode to be off. If Scroll Lock is on, these keys scroll the chart window without moving the caret.

The state of Scroll Lock mode is indicated on the TreeChart Status Bar.

To move the Insertion Point	Press
One box left	LEFT ARROW
One box right	RIGHT ARROW
One box up	UP ARROW
One box down	DOWN ARROW
To the top-left box	HOME
To the bottom-right box	END

Keys for scrolling a chart window

Use the following keyboard shortcuts to scroll a chart window without moving the caret.

Scrolling the window 'a little' means 20% of the window; scrolling 'a lot' means 90% of the window.

Note that many keys for scrolling the chart window without moving the caret require Scroll Lock mode to be on. These keys are marked (SCRL). If Scroll Lock is off, these keys move the caret; the chart window may then scroll automatically to ensure the Current Box is visible.

The state of Scroll Lock mode is indicated on the TreeChart Status Bar.

To scroll the chart window	Press
Left a little (SCRL)	LEFT ARROW
Left a lot	CTRL+PAGE UP
Right a little (SCRL)	RIGHT ARROW
Right a lot	CTRL+PAGE DOWN
Up a little (SCRL)	UP ARROW
Up a lot	PAGE UP
Down a little (SCRL)	DOWN ARROW
Down a lot	PAGE DOWN
To the top-left of the chart (SCRL)	HOME
To the left edge of the chart (SCRL)	CTRL+HOME
To the bottom-right of the chart (SCRL)	END
To the right edge of the chart (SCRL)	CTRL+END

Keys for selecting boxes

Use the following keyboard shortcuts to select boxes.

Any TreeChart command that can only apply to on one <u>box</u> always applies to the <u>Current Box</u>. Any command that can apply to more than one box always applies to the selected boxes, or if no boxes are selected then the Current Box.

To	Press
Toggle the selection status of the Current Box	SPACE
Select all boxes	CTRL+A
Select the Current Box and all boxes below it	CTRL+T
Select all boxes at the same <u>level</u> as the Current Box	CTRL+H
Select all boxes immediately below the Current Box	CTRL+I
Select all boxes with subordinates	CTRL+1
Select all boxes without subordinates	CTRL+2
De-select all selected boxes	CTRL+G

Keys for adding, removing and re-arranging boxes

Use the following keyboard shortcuts to insert, delete, cut and paste boxes.

To	Press
Insert a box in an empty chart or view	ALT+any arrow key
Insert a new box above the Current Box	ALT+UP
Insert a new box below the Current Box	ALT+DOWN
Insert a new box to the left of the Current Box	ALT+LEFT
Insert a new box to the right of the Current Box	ALT+RIGHT
Paste Clipboard contents below the Current Box	CTRL+V
Paste Clipboard contents left of the Current Box	CTRL+L
Paste Clipboard contents right of the Current Box	CTRL+R
Swap two selected boxes	CTRL+W
Undo last box insertion or box deletion	CTRL+Z

The following commands apply to the selected boxes, or if no boxes are selected then the Current Box:

To	Press
Delete boxes	DEL
Copy boxes to Clipboard	CTRL+C
Cut boxes to Clipboard	CTRL+X

Keys for changing box text

Use the following keyboard shortcuts to define the <u>Text Fields</u> in <u>boxes</u> and edit each box's text.

To	Press
Define the Text Fields	F3
Edit Text Fields of the <u>Current Box</u>	ENTER

In the Edit Text Fields dialog box:

Move between Text Fields	UP or DOWN
Move between text table, OK and Cancel buttons	TAB
Extend selection in a text field	SHIFT+ARROW key
Extend selection to first character in text field	SHIFT+HOME
Extend selection to last character in a text field	SHIFT+END
Copy selected text to <u>Clipboard</u>	CTRL+C
Cut selected text to Clipboard	CTRL+X
Paste text from Clipboard	CTRL+V

Keys for editing the Layout used by the Current Box

Use the following keyboard shortcuts to edit the <u>Layout</u> used by the <u>Current Box</u>.

Note that other <u>boxes</u> may also be using the Layout used by the Current Box. Changing a Layout's settings will automatically affect all boxes using that Layout.

To change	Press
Size settings	F8
Spacing settings	SHIFT+F8
All other Layout settings	SHIFT+ENTER
Text styles	CTRL+Y

The Text Styles command allows you to make a series of changes to the text styles of any group of fields within any group of Layouts.

Keys for changing which Layout is used by selected boxes

Use the following keyboard shortcuts to change which <u>Layout</u> boxes use.

The following commands apply to the selected <u>boxes</u>, or if no boxes are selected then the <u>Current Box</u>:

To	Press
Choose a Layout from a list of those available	CTRL+D to show the Define Layouts dialog
Use the <u>Default Layout</u> for the <u>level</u> each box is at	CTRL+U

Keys for changing the Border

Use the following keyboard shortcuts to define Border <u>Text Fields</u>, and change the text, appearance and margins of the <u>Border</u>.

To	Press
Define the Border Text Fields	SHIFT+F3
Edit the Border Text Fields	F7
Change the Border <u>Layout</u>	SHIFT+F7
Change the Border Margins	CTRL+F7

In the Edit Border Text Fields dialog box:

Move between Text Fields	UP or DOWN
Move between text table, OK and Cancel buttons	TAB
Extend selection in a text field	SHIFT+ARROW key
Extend selection to first character in text field	SHIFT+HOME
Extend selection to last character in a text field	SHIFT+END
Copy selected text to <u>Clipboard</u>	CTRL+C
Cut selected text to Clipboard	CTRL+X
Paste text from Clipboard	CTRL+V

Keys for hiding boxes (outlining)

Use the following keyboard shortcuts to focus on one sub-tree of the chart, or collapse <u>boxes</u> to hide boxes below them.

To	Press
View the whole chart	CTRL+Q
Focus on <u>Current Box</u> or chart root	CTRL+F
Collapse selected boxes	CTRL+K
Expand selected boxes	CTRL+E
Expand all collapsed boxes	CTRL+SHIFT+E

Keys for changing the scale at which a chart is displayed

Use the following keyboard shortcuts to change the zoom factor, which determines the scale at which a chart is displayed.

To	Press
Zoom In	+
Zoom Out	-
Restore normal (100%) zoom	=
Set a specific zoom factor	F2 to open Toolbar list, then UP and DOWN to change, then ENTER

Keys for managing the TreeChart application window

Use the following keyboard shortcuts to control the TreeChart application window and switch between applications.

To	Press
Open the TreeChart application control menu	ALT+SPACEBAR
Quit TreeChart	ALT+F4
Switch to next application window or icon	ALT+ESC
Switch to next application, restoring if minimised	ALT+TAB
Move the TreeChart application window	ALT+SPACEBAR to open the Control menu
	ARROW keys to move the window
	ENTER to complete the move
Change the TreeChart application window size	ALT+SPACEBAR to open the Control menu
	ARROW key to pick up a window edge
	ARROW keys to move the window edge
	ENTER to complete the re-size

Keys for managing chart windows

Use the following keyboard shortcuts to control a chart window and switch between chart windows.

To	Press
Open the active chart's Control menu	ALT+HYPHEN
Close the active chart window	CTRL+F4
Switch to next chart window	CTRL+F6
Switch to previous chart window	CTRL+SHIFT+F6
Restore minimised chart window to previous size	ENTER
Move the active chart window	ALT+HYPHEN to open the Control menu
	ARROW keys to move the window
	ENTER to complete the move
Change the active chart window size	ALT+HYPHEN to open the Control menu
	ARROW key to pick up a window edge
	ARROW keys to move the window edge
	ENTER to complete the re-size

Keys for choosing menus and commands

Use the following keyboard shortcuts to choose menus or commands.

To	Press
Get Help	F1
Activate the menu bar	F10
Choose the TreeChart window control menu	ALT+SPACEBAR
Choose the chart window control menu	ALT+HYPHEN
Close any open menu	ESC
Close a chart window	CTRL+F4
Choose the File menu	ALT+F
Choose the Edit menu	ALT+E
Choose the View menu	ALT+V
Choose the Layout menu	ALT+L
Choose the Chart menu	ALT+C
Choose the Window menu	ALT+W
Choose the Help menu	ALT+H
Open a new chart	CTRL+N
Open an existing chart	CTRL+O
Save the active chart	CTRL+S
Print the active chart	CTRL+P
Show or hide the Toolbar	SHIFT+F2
Show or hide the Status Bar	CTRL+F2

Keys for working with dialog boxes

Use the following keyboard shortcuts to move between controls in a dialog box, and select options.

To	Press
Cancel the dialog	ESC
Move between controls or groups	TAB
Move between controls or groups (reverse order)	SHIFT+TAB
Move directly to control or group	ALT+underlined letter
Move between options within a group	ARROW key
Execute a command button	ENTER
Open a drop-down list box	ALT+DOWN
Select item in a drop-down list box	ALT+UP or ALT+DOWN
Select or clear a checkbox	SPACEBAR
Extend selection in a text box	SHIFT+ARROW key
Extend selection to first character in text box	SHIFT+HOME
Extend selection to last character in a text box	SHIFT+END
Select next list-item beginning with a character	character key

Extended-selection list boxes:

Select or cancel selection of item	SHIFT+ARROW key
Select all items	CTRL+SLASH (/)
Cancel all selections except the current selection	CTRL+BACKSLASH (\)
Extend selection	SHIFT+ARROW key
Extend selection to first item	SHIFT+HOME
Extend selection to last item	SHIFT+END
Select non-consecutive items	SHIFT+F8 to begin 'add mode' (cursor blinks)
	ARROW keys move between items
	SPACEBAR to select or cancel selection of item
	SHIFT+F8 to finish 'add mode' (cursor normal)

Keys to access Toolbar buttons

Use the following keyboard shortcuts to access buttons on the <u>Toolbar</u>. These keys can be used even if the Toolbar is not displayed.

To access the	Press
New button	CTRL+N
Open button	CTRL+O
Save button	CTRL+S
Cut button	CTRL+X
Copy button	CTRL+C
Paste Below button	CTRL+V
Select All button	CTRL+A
Select Sub-Tree button	CTRL+T
Select Level button	CTRL+H
Select Subordinates button	CTRL+I
Mark Boxes button	CTRL+M
Text Styles button	CTRL+Y
Define Layouts button	CTRL+D
View All button	CTRL+Q
Focus button	CTRL+F
Collapse button	CTRL+K
Expand button	CTRL+E
Expand All button	CTRL+SHIFT+E
Print button	CTRL+P
Print Preview button	
Help Mode button	SHIFT+F1
Zoom: open list	F2
Zoom: change list selection	UP or DOWN ARROW
Zoom: close list	ENTER

Keys for marking boxes as exceptions to the rules

Use the following keyboard shortcuts to change the markers of the selected boxes, or if no boxes are selected, the Current Box

To	Press
Show the Mark Boxes dialog box	CTRL+M
Set the Invisible marker	F9
Clear the Invisible marker	SHIFT+F9
Set the Disconnect from Parent marker	CTRL+F9
Clear the disconnect from Parent marker	CTRL+SHIFT+F9
Set the Co-Manage Left marker	F10
Clear the Co-Manage Left marker	SHIFT+F10
Set the Co-Manage Right marker	CTRL+F10
Clear the Co-Manage Right marker	CTRL+SHIFT+F10
Set the Co-Manage Group marker	F11
Clear the Co-Manage Group marker	SHIFT+F11
Set the Assistant marker (placing Right)	F12
Set the Assistant marker (placing Left)	CTRL+F12
Clear the Assistant marker	SHIFT+F12

Note that the F11 key also sets/clears the Invisible and Disconnect from Parent markers.

Marking Boxes as Exceptions to the Rules

TreeChart minimizes the amount of work you have to do by making two assumptions:

- That all subordinates to a <u>box</u> are positioned and connected uniformly.

- That each box in the hierarchy has only one parent.

Most of the time you'll appreciate the benefits of these assumptions, but occasionally you'll find it useful to be able to mark some boxes as exceptions to the rules.

You can think of boxes as having a set of flags associated with them. Each flag indicates a particular exception condition, and you can set a flag to mark a box as an exception to the rule. By default, all the flags are cleared. The flags are independent, and can be used in any combination.

When you save your chart the flags are saved too. If you copy and paste boxes, the flags are copied along with the box text.

- You can set or clear individual marker flags.

- You can select boxes depending on the state of marker flags.

For the meaning of the individual markers, see:
<u>Assistant</u>
<u>Co-Manage Group</u>
<u>Co-Manage Left</u>
<u>Co-Manage Right</u>
<u>Disconnect from Parent</u>
<u>Ignore when matching Heights/Widths</u>
<u>Invisible</u>

See Also
<u>Selecting Boxes</u>
<u>Mark Boxes command</u>
<u>Select Marked command</u>
<u>Keys for marking boxes as exceptions to the rules</u>

Mark Boxes command (Edit menu)

Boxes can be marked as exceptions to the normal Layout rules.

Use this command to change the markers of the selected boxes, or the Current Box if no boxes are selected.

Shortcuts

Toolbar:

Keys: CTRL+M

See Also

Selecting Boxes
Marking Boxes as Exceptions to the Rules
Mark Boxes dialog box
Keys for marking boxes as exceptions to the rules

Select Marked command (Edit menu)

Boxes can be marked as exceptions to the Layout rules.

Use this command to select boxes based on their marker settings.

See Also
Marking Boxes as Exceptions to the Rules
Select Marked Boxes dialog box
Keys for marking boxes as exceptions to the rules

Box Marker: Invisible

Boxes marked in this way are simply not drawn, but their connectors are.

The overall effect is that subordinates of an invisible box are positioned one level lower in the hierarchy than would normally be the case. For example, here there is an Invisible box between the Director and the Researcher.
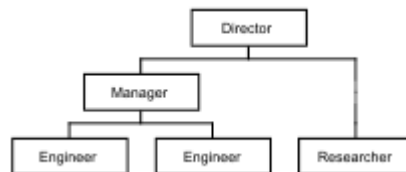
If you enter text in a box marked as Invisible, the text is drawn and obscures the connecting lines. This can be useful to annotate lines.

Shortcuts
Key to Set: F9
Key to Clear: SHIFT+F9

Note that this marker is also changed by the shortcut keys associated with the Co-Manage Group marker.

Box Marker: Disconnect from Parent

Boxes marked in this way are simply 'disconnected' from their parent by omitting their connecting lines.

For Example:
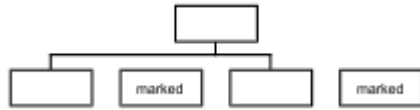
Any part of the connector which is drawn purely to attach a disconnected box is omitted. If all subordinates are marked as disconnected, any common part of the connector is also omitted. If you do want to omit all connecting lines, its often easier to define and use a new Layout, specifying a connector line width of '(none)'.

Shortcuts
Key to Set:	CTRL+F9
Key to Clear:	CTRL+SHIFT+F9

Note that this marker is also changed by the shortcut keys associated with the Co-Manage Group marker.

Box Marker: Co-Manage Left

Boxes marked in this way have an additional connecting line drawn automatically: direct from the center of the marked box to the center of the 'nearest' subordinate of the box to the left on the same sub-tree.
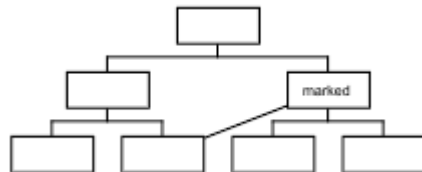
For example:

This exception is useful for illustrating dual-reporting structures.

The additional line is normally drawn in the same style as the connections from the marked box to its subordinates. Select the **Co-Manager Links as Dotted Lines** marker to instead draw a thin dotted line.

Shortcuts
Key to Set: F10
Key to Clear: SHIFT+F10

Box Marker: Co-Manage Right

Boxes marked in this way have an additional connecting line drawn automatically: direct from the center of the marked box to the center of the 'nearest' subordinate of the box to the right on the same sub-tree.
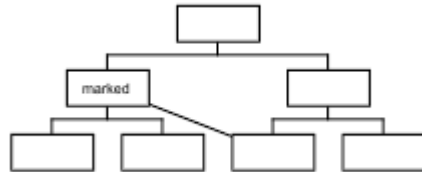
For example:

This exception is useful for illustrating dual-reporting structures.

The additional line is normally drawn in the same style as the connections from the marked box to its subordinates. Select the **Co-Manager Links as Dotted Lines** marker to instead draw a thin dotted line.

Shortcuts
    Key to Set: CTRL+F10
    Key to Clear: CTRL+SHIFT+F10

Box Marker: Co-Manage Group

Boxes marked in this way are disconnected from their subordinates, and those subordinates are instead connected to the boxes to the left & right of the marked box (on the same sub-tree).

For example:
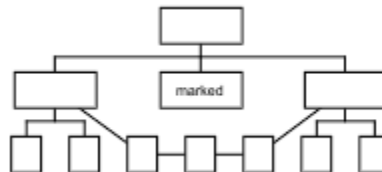
This is useful in illustrating some situations involving a dual reporting structure. The marked box is effectively a placeholder   grouping a department actually managed by the boxes to its left & right.

The marked (placeholder) box is often also marked as Invisible and Disconnect from Parent. The shortcut key also changes these markers.

The additional lines are normally drawn in the same style as the connections from the marked box to its subordinates. Select the **Co-Manager Links as Dotted Lines** marker to instead draw thin dotted lines.

Shortcuts
    Key to Set: F11
    Key to Clear: SHIFT+F11

Mark Boxes dialog box

The Mark Boxes dialog box allows you to change the individual markers for the selected boxes. If no boxes are selected, the markers of the Current Box are changed.

When the dialog box is initially shown:

- A checkbox will be checked if the corresponding flag is set in every selected box.
- A checkbox will be blank if the corresponding flag was clear in every selected box.
- A checkbox will be grayed if the corresponding flag is different in the selected boxes.

If you choose the OK button, the dialog box is completed, and the flags in the selected boxes are changed:

- Where a checkbox is checked, the corresponding flag will be set in every selected box.
- Where a checkbox is blank, the corresponding flag will be cleared in every selected box.
- Where a checkbox is gray, the corresponding flag will remain unchanged.

If you choose the Cancel button, the dialog box is removed without changing any flags.

For the meaning of the individual markers, see:
Assistant
Co-Manage Group
Co-Manage Left
Co-Manage Right
Disconnect from Parent
Ignore when matching Heights/Widths
Invisible

See Also
Marking Boxes as Exceptions to the Rules
Keys for marking boxes as exceptions to the rules
Keys for working with dialog boxes

Select Marked Boxes dialog box

The Select Marked Boxes dialog box allows you to select <u>boxes</u> depending on their marker settings.

Each individual flag has its own checkbox. The checkboxes are three-state, which means they can be "don't care" as well as the normal on and off. The "don't care" state is indicated by a gray pattern. Clicking on a checkbox cycles through the three states.

When the dialog box is initially shown, all checkboxes are grayed.

Use the checkboxes to specify a search pattern. Checkboxes that are not grayed mean that the associated flag must be in the state (on or off) that you have chosen.

For example:

To select all boxes that with the Co-Manage Left marker set, and the Invisible marker set, and the Disconnect from Parent marker clear:

Co-Manage Left checkbox	checked
Invisible checkbox	checked
Disconnect from Parent checkbox	clear

When you choose the OK button, all boxes matching the search pattern are selected.

If you choose the Cancel button, the dialog box is removed without changing the current selections.

For the meaning of the individual markers, see:
<u>Assistant</u>
<u>Co-Manage Group</u>
<u>Co-Manage Left</u>
<u>Co-Manage Right</u>
<u>Disconnect from Parent</u>
<u>Ignore when matching Heights/Widths</u>
<u>Invisible</u>

See Also
<u>Selecting Boxes</u>
<u>Marking Boxes as Exceptions to the Rules</u>
<u>Keys for marking boxes as exceptions to the rules</u>
<u>Keys for working with dialog boxes</u>

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🟩 Box Marker: Assistant

<u>Boxes</u> marked in this way are regarded as Assistants when subordinate to another box. This means that they are positioned and connected differently to the other subordinates. For example:

This is useful in illustrating the common requirement when preparing an Organization Chart to indicate that this subordinate is actually an assistant, a secretary or has a similar relationship to a manager.

Assistants are normally positioned to the right of the vertical line. Select the **Place Left** marker to position the Assistant to the left of the vertical line.

Shortcuts
Key to Set, placing Right: F12
Key to Set, placing Left: CTRL+F12
Key to Clear: SHIFT+F12

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Box Marker: Ignore when matching Heights / Widths

These two markers enable you to fine-tune the automatic matching of <u>box</u> sizes.

You can tell TreeChart to make all boxes (within various categories) the same size. All the boxes would then be enlarged to match the largest box.

These markers allow you either to ignore a particularly large box (and make all other boxes the same size as the second largest box), or to prevent a particularly small box from being enlarged.

See Also
   <u>Match Box Sizes command</u>

▣ The steps involved in preparing charts

At its simplest, preparing a chart is a five step process:

- ■ Define a hierarchy of <u>boxes</u>.
- ■ Enter the text for each box.
- ■ Specify how the chart should look.
- ■ Add any titles and a border.
- ■ Print the chart.

Naturally, TreeChart lets you jump back and forth between these steps so you can try out your ideas before committing the chart to paper.

See Also
<u>Working in a chart window</u>
<u>Inserting boxes</u>
<u>Edit Text command</u>
<u>Boxes and Layouts</u>
<u>Adding Titles and a Border</u>
<u>Printing charts</u>

◆

▣ Printing charts

TreeChart always prints the <u>Current View</u> - that is, any outlining selections are applied to the printed chart as well as the chart displayed on the screen. What you see on the screen is what will be printed. To print the whole chart, you must view the whole chart.

When you print a chart, it is framed by its <u>Border</u>.

The advantage of printing the Current View, rather than the whole chart, is that it allows you to print a chart as a series of pages. With an organization chart, for example, you could print top-level management on one page, then each department on further pages. Each page would have its own Border and titles.

How the chart gets printed is determined by a series of factors:

■ Position the Border on the page, leaving an area available for the chart
■ Match the chart to the available area
■ Position the chart within the available area
■ Add any titles and a border.
■ Print the chart plus Border

Positioning the Border on the Page

The paper size is determined by the selected printer, and the paper source and orientation. The Page Margins specify the distance between the edge of the paper and the border rectangle (fig 1).
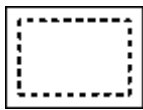

fig 1   fig 2   fig 3

The Border Margins (plus text styles and position) specify where Border text is placed relative to the border rectangle (fig 2).

Most printers have small non-printable regions near the edges of the page. If any Border elements extend into the non-printable area, the Border position is automatically adjusted to prevent incomplete printing.

The remaining Border Margins specify a minimum distance between border elements and the chart. This defines the area available for the chart (fig 3).

Matching the chart to the available area

If the chart is larger than the available area, either the chart is reduced to fit the available area, or the available area is enlarged to accommodate the chart.

If the Print Style is **Fit-to-Page**, the chart is proportionately reduced.

If the Print Style is **Poster**, additional pages are added to make the available area larger than the chart. The Border will remain at the same distance from the paper edge, but will only appear on 'outer' sheets of paper. For example:

To change the Print Style, use the Page Setup command.

Positioning the chart within the available area

The Chart Alignment selection in the Page Setup dialog determines where the chart is positioned within the available area.

See Also
    Page Setup command
    Border Margins command
    Border Layout command
    Outlining
    Adding Titles and a Border
    Print command
    Print Preview command
    Print Setup command
    Printing hints & tips

Boxes and Layouts

A box is TreeChart's term for a record in a hierarchically structured database.

Like a database record, the text that appears within a box is divided into fields. Like a database, all boxes have the same number of fields. When creating a chart you decide how many fields you need. You don't have to get this perfect before starting a chart: you can add or delete fields at any time.

Having constructed a hierarchy of boxes, the way the information is illustrated is determined by the Layout settings you choose.

A Layout defines how a box appears in a chart, and how it is arranged with and connected to the boxes hierarchically under it.

Layouts are similar to Style Guides found in more sophisticated word processors, and can greatly assist you in achieving a consistent appearance to your charts. Every box in a chart uses one of the Layouts you have defined. When you change the settings of a Layout, it automatically affects every box using that Layout. You can define any number of Layouts and tell a box to use a different Layout any time you like.

See Also
    Inserting boxes
    Working in a chart window

Adding titles and a Border

When your chart is to be presented, a Border is added. The Border acts as a frame around your chart, and can add titles, headers, footers or any other text fields that you need. The Border frames your chart not only when printing, but also when copying the chart to the Clipboard as a picture, and when saving a file in picture format.

The process of deciding how the Border appears is very similar to deciding how an individual box appears:

- Define what Border text fields you need.
- Enter the Border text.
- Change the Border Layout, to specify how the Border appears.
- Change the Border Margins, to specify distances between the border, its text and the chart.

The similarity goes further, and in most respects the Border can be thought of as a special box into which your chart is placed.

See Also
Define Border Text Fields command
Border Margins command
Border Layout command
Edit Border Text command
Printing charts

◼ Speeding up your work with Template Files

A Template is simply a chart that acts as a starting point when you create a new chart.

A Template contains:

- Definition of <u>Text Fields</u>
- A set of <u>Layouts</u>
- Definition of <u>Default Layouts</u>
- <u>Border</u> text and Layout
- Page margins and print style (poster or fit-to-page)
- Overall box size-matching rules
- Custom color settings

Normally, a Template would contain no <u>boxes</u>, though you can store boxes in a Template file if you wish - these boxes would then be created automatically for you when you create a new chart.

The file format of Templates is identical to charts, but Template files are normally given a filename extension of **.TCT** to indicate they serve a different purpose.

There are two situations where a Template is used:

- When you create a new chart
- When you open a text-format file

In both cases, TreeChart simply reads the Template File you have specified before allowing you to modify the chart or reading the text-format file.

If you change the settings of a Template File, for instance, changing some colors, this will not affect charts previously created from this Template, only charts created after the change.

If you choose not to specify a Template File, or TreeChart is unable to read the Template File you have specified, TreeChart uses a built-in default Template.

To create a new Template File:

Since a Template is simply an empty chart, creating a Template is just like creating a chart, then deleting all the chart-specific information (ie the boxes):

1 Prepare a chart
2 Delete all the boxes
3 Save the (empty) chart with a filename extension of .TCT

For step **1**, you could open an existing chart whose style you wished to use as a Template, or open an existing Template, or create a chart from scratch.

To edit an existing Template File:

Since a Template is simply an empty chart, editing a Template is just like editing a chart, then deleting all the chart-specific information (ie the boxes):

1 Open the Template File

2   Temporarily insert some boxes to illustrate the changes you'll make
3   Make the desired changes
4   Delete all the temporarily inserted boxes
5   Save the Template

To specify which Template File to use for newly-created charts:

1   From the File menu, choose Preferences
2   In the Template control, select the file to be used as the Template
3   Choose the OK button

See Also
Opening a text-format file
Preferences command

Inserting new boxes

You can insert a new <u>box</u> above, below, to the left or to the right of an existing box. The existing box you'd like the new box to connect to must first be made the <u>Current Box</u>.

Box insertion works in terms of the hierarchy rather than where boxes are drawn. For example, to add a co-worker under the same manager, you would **always** insert left (or right) of an existing box. Where the new box gets drawn in relationship to the existing box is a separate issue.

If you insert a new box below a box that has subordinates, all those subordinates are 'demoted' and become subordinates of the newly-inserted box. In Organization Chart terms, inserting a box below a manager creates a new middle manager position.

When you insert a new box ...

- its initial appearance is determined by which <u>Layout</u> it initially uses. You can choose how initial Layouts are assigned.

- the <u>caret</u> is always moved to make the new box the Current Box. If necessary, the chart window is automatically scrolled to make the newly-inserted box visible.

- You can choose to automatically be prompted to enter the text associated with the box.

If you make a mistake when inserting a box, you can undo the insertion.

Inserting a box with the mouse

With the mouse, you can insert a new box next to an existing box by simply dragging from the existing box.

Inserting a box with the keyboard or menus

1 Move the caret to the box you'd like to insert next to
2 From the Edit menu, choose Insert Above, Below, Left or Right

Inserting a box in an empty chart

Inserting a box in an empty chart is just like inserting subsequent boxes, except that you don't have to tell TreeChart which box the new box should be connected to. The keyboard and menu box insertion commands are unchanged.

To insert a box in an empty chart with the mouse, drag from anywhere in the chart window.

See Also
<u>Initial and Default Layouts</u>
<u>Insert Above command</u>
<u>Insert Below command</u>
<u>Insert Left command</u>
<u>Insert Right command</u>
<u>Preferences command</u>
<u>Using a mouse in a chart window</u>

Undo command

Initial and Default Layouts

When a new box is inserted, it automatically uses one of the Layouts you have defined. While you can change which Layout a box uses at any time, you can speed up your work by specifying how these initial Layouts should be assigned.

There are two options for the initial Layout:

- Use the same Layout as the box you are inserting next to
- Use the Default Layouts for the level at which the new box is inserted

To change the initial Layout option:

1. From the File menu, choose Preferences
2. In the Initial Layout radio buttons, select Level Dependent or Same as Current Box
3. Choose the OK button

The Initial Layout is a program option affecting all open charts, and is not stored with any chart.

Default Layouts are those chosen by you as being the most appropriate for each level in the hierarchy. The Default Layout for a particular level is determined as a two-step process:

- If there is a specific Layout named as Default for this level, use it
- If there is no specific Layout named for this level, use a chart-wide default

To Specify the Default Layout for any Level:

1. From the Layout menu, choose Defaults
2. Select different Layouts in the default or level-dependent drop-down lists
3. Choose the OK button

The chart-wide default can be selected from the Default drop-down list.

Defaults for specific levels can be selected from the level-specific drop-down lists. If you don't want to name a specific Layout as default for a level, just select '(default)' in the list.

Only eight levels can have defaults specified, any boxes inserted at levels nine and above will always use the chart-wide default.

Other uses of Default Layouts

While the Default Layout for a given level is only used when inserting a new box, there are occasions when its useful to select a group of boxes and set them to use their Default Layouts. One occasion is when you copy a set of boxes to the Clipboard, then paste them somewhere else in the chart. TreeChart preserves a reference to the Layout they were using and (assuming its still defined) uses that when pasting back into the chart. Sometimes, this might not be what you want, so in these circumstances, select the boxes that have been pasted, then request that they use their Default Layout.

To tell a box to use its Default Layout:

1   Select the boxes you which should use their Default Layouts
If no boxes are selected, the Current Box is used

2   From the Layout menu, choose Use Default

See Also

Default Layouts command
Inserting boxes
Preferences command
Selecting Boxes
Use Default command

Select Boxes With Subordinates command

Use this command to select all underline boxes in the Current View that have boxes below them.

Boxes which have their subordinates hidden using outlining techniques are also selected.

Shortcuts
Keys: CTRL+1

See Also
Outlining
Selecting Boxes
Keys for selecting boxes

Select Boxes Without Subordinates command

Use this command to select all <u>boxes</u> in the <u>Current View</u> that do not have boxes below them.

Boxes which have their subordinates hidden using outlining techniques are not selected.

Shortcuts
Keys: CTRL+2

See Also
<u>Outlining</u>
<u>Selecting Boxes</u>
<u>Keys for selecting boxes</u>

Text Field Options dialog box

This dialog box allows you to choose options concerned with how the selected Text Field is displayed for the Layout you are editing.

Prefix and Suffix

Enter text that will precede or follow box or border text. This text is shown using the same font as the field itself. If you want spaces between the field and prefix or suffix, this should be included in the prefix or suffix.

If the field is empty for a box or the border, the prefix and suffix are normally omitted. If you want the prefix or suffix to be shown when the field is empty, select the appropriate checkbox.

Field Format

Some calculated fields can be shown in a number of different formats. If this listbox is enabled, choose the format you prefer.

Field width and Spacing between fields on the same line

The space needed to show each text field is the main factor in determining the size of a box. Normally, TreeChart will make each box large enough to show whatever text is associated with the box, but you can control how this is done.

The width of a field can either be automatically calculated or a fixed size.

Automatic

For automatically calculated field widths, the gap between fields on the same line is determined by the number of **spaces** that follow the field.

The **Max Chars** control allows you to limit how much box text is displayed. Lengthy text fields can therefore be truncated. The limit is imposed on the actual box or border text; any prefix or suffix text is unaffected by this setting. See **Handling Truncated Fields** (below) for further information on truncating fields.

Manual

Manually set field widths are fixed distances. These allow you to tabulate and align groups of fields.

Text (plus any prefix or suffix text) will be displayed within a fixed width. To control spacing between fields on the same line, you must also specify the distances before and after this fixed width.

The text can be positioned to be left-, center- or right-aligned within the fixed width you have selected.

If the text (plus prefix or suffix text) is too wide for the width you have specified, it will be truncated.

Handling Truncated Fields

Fields can be truncated if you manually set a fixed width or if you select a limit on the number of characters to be shown for an automatically calculated width. In both cases, the right-most characters are normally omitted.

Select the **Truncate Start of Text** checkbox if you prefer to have the left-most characters omitted.

Select the **Indicate Truncated Text** checkbox if you would like "..." to precede or follow the text to indicate that text truncation has taken place.

See Also
    Automatically Calculated Border Fields
    Automatically Calculated Box Fields

Template Settings dialog box

This dialog box allows you to choose how boxes are created when you later use this chart as a <u>Template</u> File.

When you open a text-format file, TreeChart opens the Template File you have selected then pastes into the chart the <u>boxes</u> created from the text-format file.

If the Template File contains boxes, the <u>Current Box</u> is remembered, and you can choose whether the newly-created boxes should be pasted to the **left**, to the **right** or **below** the Current Box.

If the Current Box is correct, select a direction then choose **OK** to save the Template File.

If the Current Box is not correct, choose **Cancel**, change the Current Box then repeat the Save operation.

If the Template File does not contain any boxes, these settings are irrelevant and this dialog is not shown.

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Automatically Calculated Box Fields

When editing a <u>Layout</u> to determine which <u>fields</u> are shown, and their position and style, a number of automatically calculated fields can be shown in addition to the <u>Box</u> Fields that you have defined:

<number>	Boxes are numbered from top-left to bottom-right
<level>	The level within the chart
<outline number>	Box classification code (eg 1.2.3.2)
<relative number>	Subordinate number; subordinates are numbered left to right.

Automatically calculated box fields reflect the entire chart: if you do outlining, these fields don't change.

For each of these fields, you can choose from a range of different formats.

Changing the field format

The field format is a Layout setting. To change the format:

1 Edit the Layout
2 Select the field
3 Choose the Options button
4 Choose from the list of available Formats

Default field formats

If the Layout format "(default)" is selected, the format defined by the program preferences is used. Note that program preferences are not saved with charts.

See Also
<u>Edit Layout command</u>
<u>Outlining</u>
<u>Preferences command</u>

Automatically Calculated Border Fields

When editing the Border Layout to determine which fields are shown, and their position and style, a number of automatically calculated fields can be shown in addition to the Border Fields that you have defined:

<date/time>   The date/time on which the chart is printed (or a picture
                   is exported)

<file name>   The full pathname of the chart (the chart window title is
                   used if the chart hasn't been saved yet)

<file title>   The chart window title

For the date / time field, you can choose from a range of different formats.

Changing the field format

The field format is a Border Layout setting. To change the format:

    1   Edit the Border Layout
    2   Select the field
    3   Choose the Options button
    4   Choose from the list of available Formats

Default field formats

If the Border Layout format "(default)" is selected, the format defined by the program preferences is used. Note that program preferences are not saved with charts.

See Also
    Border Layout command
    Preferences command

Text Styles command (Layout menu)

Use this command to make a series of changes to the text styles of any group of fields within any group of Layouts.

Shortcuts

Toolbar:

Keys: CTRL+Y

See Also
Text Styles dialog box

Text Styles dialog box

This dialog box allows you to make a series of changes to the text style of any group of <u>fields</u> within any group of <u>Layouts</u>.

   1   Select a group of **Layouts**
   2   Select a group of **Fields**

The various style controls are updated to reflect the current styles of the Fields and Layouts you have selected. Where controls are blank or grayed, the current styles vary.

The **Increase** and **Decrease** buttons immediately enlarge or reduce the point size of text within the selected Fields and Layouts, while maintaining relative differences. The chart is immediately re-drawn to reflect the change. To make selected fields the same point size, use the **Size** control.

Font   Select from the list of available fonts. TreeChart lists only those fonts that are available on the current printer and for screen use. Leave the selection blank to leave current fonts unchanged.

Size   Select the point size you require. Leave the selection blank to leave current point sizes unchanged.

Color   Select a color for the text. Leave the selection blank to leave current text colors unchanged.

Hide   Select this checkbox to hide text fields.

Bold   Select this checkbox to enable bold text.

Italic   Select this checkbox to enable italic text.

Strikeout   Select this checkbox to enable text strikeout.

Underline   Select this checkbox to enable text underlining.

After changing style settings, choose **OK** to apply the changes to all selected Fields within all selected Layouts, and complete the dialog.

Choose **Apply** to apply the changes but remain in the dialog. The chart is redrawn to reflect the changes you have made. This allows you to select different Fields or Layouts and then make further changes to the style settings.

Choose the **Cancel** button to complete the dialog without making any changes. If you **Apply** a change, this cannot be undone, and the **Cancel** button is changed to a **Close** button. Choosing **Close** completes the dialog, ignoring selections made since the last **Apply**, **Increase** or **Decrease** operation.

Printing Hints & Tips

These hints & tips include ideas for working with printers.

They also describe a few printing problems that we are aware of, and some ideas as to how you might overcome them.

See Also:
Connecting Lines Drawn Through Boxes
Losing Text When Poster Printing
Maximizing the area of paper used when printing
Minimum Page Margins
Omitting the Border
Print Preview Shows Text Badly
Working With a Plotter

Working with a Plotter

TreeChart can print to a plotter, but a few restrictions are imposed, and you should also bear in mind a few other points.

- The Chart background color is ignored
- Box interior colors are ignored
- Pen thickness is hardware dependent
- Text simulation in print preview is imprecise

See Also
Chart Background Color

Losing Text When Poster Printing

When TreeChart prints a chart as a Poster, a number of pages are produced which you then have to stick together.

The Page margins and Border Margins you specify determine the position of the Border relative to the outer edge of these combined pages. For page breaks within the chart, TreeChart prints right up to the edge of the printable area.

TreeChart makes no attempt to ensure that boxes don't lie on a page break. To do so would be quite difficult: moving a box to avoid a page break might mean that subordinate boxes that moved with it were moved onto page breaks. It would also mean that when you assembled the separate pages, some boxes would look badly positioned. Boxes can also be wider than a page.

Its therefore quite possible that some box text will lie across a page break. Some printers perform character level clipping: if this individual character doesn't entirely fit on the page, the character isn't printed. Where this happens, characters will be lost at page breaks.

There are two possible techniques to overcome this:

Overlapped Poster Printing

If you choose the Overlapped Poster print style, part of the chart is printed on both sides of a page break.

Tell the Printer Driver not to perform character-level clipping

Printer Drivers that control printers performing character-level clipping often offer an option to disable this operation. The exact mechanism is printer dependent. For a Hewlett Packard LaserJet III:

1   From the File menu, choose Print Setup

2   Choose Options

3   Select the Print TrueType as Graphics checkbox

In this particular case, the solution works only if you use TrueType fonts, not printer fonts.

Connecting Lines Draw Through Boxes

It would appear that some printers (or printer drivers) have problems correctly interpreting graphics output. One symptom of this is when drawing a <u>box</u> fails to obscure shadows or connecting lines drawn previously: shadows encroach into the box, and unwanted lines are printed through the box.

If this happens, please ensure that you have the most recent version of the applicable printer driver. TreeChart doesn't do anything particularly clever when printing - if this problem occurs, there's an excellent chance that it will also occur for other programs that print graphics.

A workaround is available:

1   Start Notepad (or any other text-editing program)

2   Open TREECHRT.INI

> This will be in your Windows directory (probably c:\windows). Normally this would be the default directory when running Notepad.

3   Under [Preferences], add the line:

PrinterBadClip=1

4   Save TREECHRT.INI

You will need to restart TreeChart for this to take effect.

Note: this workaround applies only to charts printed directly from TreeChart. If you copy a picture into another program or save as a picture (.WMF) file, the problem will probably re-occur if or when you finally perform printing.

Print Preview Shows Text Badly

There are two unrelated errors that might occur when performing text output during Print Preview. Both errors occur because the preview is attempting to accurately simulate the final printed output.

Incorrect Font during simulation

Occasionally, when choosing a font for use during preview, an inappropriate choice is made. Text appears in the correct position, but with characters on top of each other.

Zooming the preview window will correct this problem.

Bad Character Placement

The preview normally positions each character individually, to simulate as closely as possible the final output. We have found that a small number of printer drivers cause this to fail: characters are so widely spaced that text appears almost as random characters sprayed around the page.

A workaround is available, to disable trying to position individual characters as they would be printed.

1   Start Notepad (or any other text-editing program)

2   Open TREECHRT.INI

    This will be in your Windows directory (probably c:\windows). Normally this would be the default directory when running Notepad.

3   Under [Preferences], add the line:

    PrinterBadPreview=1

4   Save TREECHRT.INI

You will need to restart TreeChart for this to take effect.

Maximizing the area of paper used when printing

The area of paper available for a chart is determined by the Page Margins and the Border Margins. You can make your chart fill the page by:

- Using the minimum page margins
- and Omitting the Border

See Also
Adding titles and a border
Minimum Page Margins
Omitting the Border
Printing charts

Minimum Page Margins

Most printers have a small non-printable region at the edges of the page. This constitutes a minimum page margin: if you were to choose margins smaller than this, some of your output would not get printed.

TreeChart handles minimum margins automatically. If the margins you specify in the Page Setup dialog box or the Border Margins dialog box would cause any of your chart to encroach into the non-printable region, your margins are automatically increased to ensure none of your chart or Border are lost.

To have TreeChart automatically place the Border as near to the paper edge as possible without losing output:

1 From the Chart menu, choose Page Setup

2 Set all Margins to 0

3 Choose the OK button

If you regularly require charts with minimum page margins, you could save these settings in a Template File.

See Also
Adding titles and a border
Printing charts
Speeding up your work with Template Files

Omitting the Border

The Border frames your chart when you:

- Copy a picture to the clipboard
- Save the chart in picture-format
- Print the chart

If you prefer not to have a border, you must change the Border Layout:

1. From the Chart menu, choose Border Layout

2. Hide all Border text fields

3. In the Line Width list, select '(none)'

4. In the Shadow list, select no shadow

5. Choose the Margins button

6. Set all Margins to 0

7. Choose OK to complete the Border Margins dialog

8. Choose OK to complete the Border Layout dialog

If you regularly require charts with no Border, you could save these settings in a Template File.

See Also
Adding titles and a border
Printing charts
Speeding up your work with Template Files

Exchanging information with other programs

TreeChart can exchange information with other programs either by opening & saving files or by copy & paste via the Windows Clipboard.

TreeChart can input text from another program and output text or pictures for use by another program.

Text formats supported are those adopted for tabulated information: a box corresponds to a line of text, with special characters separating fields. In many cases, you won't need to know the details of these formats, but further information can be found in Appendix 2 of the User Guide.

The picture format used is Windows Metafiles - these can be resized with no loss of picture quality.

See Also:
 Pasting text from another program into TreeChart
 Copying text from TreeChart into another program
 Copying pictures from TreeChart into another program
 Opening a text-format file
 Saving a text-format file
 Saving a picture-format file
 Working with Metafiles

Pasting text from another program into TreeChart

Pasting text from another program will create <u>boxes</u>. Each line of text corresponds to a box, <u>fields</u> being recognized by examining each line.

Each pasted box initially uses the <u>Default Layout</u> for the <u>level</u> at which it is pasted.

To copy text from Notepad (or similar editor / word processor):

Fields within a line should be separated by TAB characters.

   1   In Notepad, select the lines of text you want to copy.
   2   In Notepad, from the Edit menu, choose Copy.
   3   Switch to the TreeChart chart window you wish to paste into.
   4   Move the caret to select the <u>Current Box</u>.
   5   From the Edit menu, choose Paste Below, Paste Left or Paste Right, as necessary.

To copy text from a spreadsheet (or a table in a word processor):

This is always simpler than copying text from an editor or word processor, since identifying fields is almost foolproof. One new box will be created for each row copied, and each column corresponds to a field.

   1   In the Spreadsheet, select the range of cells you wish to copy.
   2   In the Spreadsheet, from the Edit menu, choose Copy.
   3   Switch to the TreeChart chart window you wish to paste into.
   4   Move the caret to select the Current Box.
   5   From the Edit menu, choose Paste Below, Paste Left or Paste Right, as necessary.

Boxes created by pasting text from another program normally contain no hierarchical information. All such boxes would therefore be placed at the same level in the hierarchy. Appendix 2 of the User Guide describes TreeChart Outline Text, which enables hierarchical information, Layout usage and box markers to be defined.

To re-organize a flat hierarchy and have boxes use their correct Default Layout:

   1   Cut & Paste the new boxes to form the correct hierarchy
   2   Select the boxes using the wrong Layout
   3   From the Layout menu, choose Use Default

See Also
   <u>Paste Below command</u>
   <u>Paste Left command</u>
   <u>Paste Right command</u>
   <u>Use Default command</u>

Copying text from TreeChart into another program

TreeChart can copy the text from boxes into other programs. Each box will correspond to a line of text, with TAB characters separating the fields.

If you paste into a spreadsheet or word processor table, each box will correspond to a row, each field to a column.

To copy box text from TreeChart into another program:

1 Select the boxes whose text you'd like to copy.
   If no boxes are selected, the text in the Current Box is copied.

2 From the Edit menu, choose Copy.

3 Switch to the program (and document window) you'd like to paste into, and position the insertion point.

4 From the Edit menu, choose Paste.

Copying information in text format is optional.

To enable copy as text format:

1 From the File menu, choose Preferences.
2 Select the Copy Text checkbox.
3 Choose the OK button.

See Also
Copy command
Preferences command

Copying pictures from TreeChart into another program

When copying a picture, TreeChart draws the Current View and adds the Border. Box selections are irrelevant.

Note that Windows imposes a limit on the size of a picture you can copy to the Clipboard (about 11"). If the height or width of the chart is greater than this limit, TreeChart scales the drawing. The program you paste the chart into may also impose its own limits and scale the chart.

To copy a picture of the Current View from TreeChart into another program

1   From the Edit menu, choose Copy.

2   Switch to the program (and document window) you'd like to paste into, and position the insertion point.

3   From the Edit menu, choose Paste.

Copying information as a picture is optional.

To enable copy as metafile format:

1   From the File menu, choose Preferences.
2   Select the Copy Metafile checkbox.
3   Choose the OK button.

See Also
Adding titles and a border
Copy command
Outlining
Preferences command
Working with Metafiles

Opening a text-format file

TreeChart can create charts from text files. Each line of text forms a <u>box</u>, <u>fields</u> being recognized by examining each line.

A <u>Template File</u> can be selected to specify the chart style.

Each box initially uses the <u>Default Layout</u> for the <u>level</u> at which it is created.

To select a Template File:

1. From the File menu, choose Preferences
2. In the Template controls, select the file to serve as the Template
3. Choose the OK button

To create a new chart from a text file:

1. From the File menu, choose Open
2. In the List Files of Type list, choose 'Text Files (*.txt)'
3. In the File Name box, choose the text file you want to open
4. Choose the OK button

Boxes created by opening a text file saved by another program normally contain no hierarchical information. All such boxes would therefore be placed at the same level in the hierarchy. Appendix 2 of the User Guide describes TreeChart Outline Text, which enables hierarchical information, Layout usage and box markers to be defined.

To re-organize a flat hierarchy and have boxes use their correct Default Layout:

1. Cut & Paste the boxes to form the correct hierarchy
2. From the Edit menu, choose Select All
3. From the Layout menu, choose Use Default

See Also
<u>Open command</u>
<u>Preferences command</u>
<u>Select All command</u>
<u>Speeding up your work with Template Files</u>
<u>Use Default command</u>

Saving a text-format file

TreeChart can save box text as a text file for use by another program. The text associated with every box in the chart is saved.

Text format files lose most of the information used internally be TreeChart, so you would normally save a **copy** of the chart as a text format file.

To save a copy of a chart as a text file for use by another program:

1   From the File menu, choose Save As

2   In the Save File as Type list, choose a text format (*.txt)
TreeChart can save in a number of different text formats. If you are unsure which is best for your needs, refer to Appendix 2 in the User Guide.

3   In the File Name box, enter a name for the file you want to save

4   Choose the OK button

See Also
Save As command

Saving a picture-format file

When saving a picture, TreeChart draws the Current View and adds the Border. Box selections are irrelevant.

Picture format files lose most of the information used internally be TreeChart, so you would normally save a **copy** of the chart as a picture format file.

To save a picture of a chart for use by another program:

1 From the File menu, choose Save As

2 In the Save File as Type list, choose 'Windows Metafile (*.wmf)'

3 In the File Name box, enter a name for the file you want to save

4 Choose the OK button

See Also
Adding titles and a border
Save As command
Working with Metafiles

Working with Metafiles

The Metafile graphics format is a standard supported by many Windows programs, and allows pictures to be resized without losing picture quality.

To get the best results, the following points should be remembered:

Maintain proportions when resizing pictures

If you resize a picture produced by TreeChart, you should try to maintain the overall proportions. If you fail to do this, you'll find that text no longer fits inside boxes.

Changing the picture

Some drawing programs recognize the individual elements that make up a Metafile picture. Such programs enable you both to modify existing elements (eg change a line color), or to add new elements. Microsoft Draw is an example.

Choose the right program to resize the picture

Drawing programs that recognize individual picture elements can resize all elements, but may have trouble resizing text. Other programs (eg word processors) treat the picture as a single object, and resizing is much more successful. Where you have a choice, always perform overall resizing in a wordprocessor rather than a drawing program.

Font availability

Metafile pictures containing text can be resized because the actual font used is selected whenever the picture is subsequently drawn, rather than when TreeChart produced the picture.

The fonts used in the picture should be available when the picture is drawn otherwise Windows uses the 'nearest' font, which may be unattractive. This tends to be an issue only if you delete fonts from your computer or if you create a picture on one computer then work with it on another.

TreeChart Commands - Quick Reference

Toolbar	Menu	Shortcuts	Description
	File menu		
▯	New	CTRL+N	Creates a new chart.
☞	Open	CTRL+O	Opens an existing chart.
	Close	CTRL+F4	Closes an opened chart.
▯	Save	CTRL+S	Saves an opened chart using the same file name.
	Save As		Saves an opened chart to a specified file name.
▤	Print	CTRL+P	Prints the Current View of the active chart.
▣	Print Preview		Displays the chart on the screen as it would appear printed.
	Print Setup		Selects a printer and printer connection.
	Preferences		Change TreeChart program preferences.
	1,2,3,4		Opens one of four most recently used files.
	Exit	ALT+F4	Exits TreeChart.
	Edit menu		
	Undo	CTRL+Z	Undo the last insertion or deletion.
✂	Cut	CTRL+X	Deletes boxes from the chart and moves them to the clipboard.
▤	Copy	CTRL+C	Copies boxes from the chart to the clipboard; optionally also copies box text and / or a picture.
▤	Paste Below	CTRL+V	Pastes boxes from the clipboard into the chart below the Current Box.
	Paste Left	CTRL+L	Pastes boxes from the clipboard into the chart to the left of the Current Box.

	Paste Right	CTRL+R	Pastes boxes from the clipboard into the chart to the right of the Current Box.
	Insert Above	ALT+UP Drag up from box	Insert a new box above the Current Box.
	Insert Below	ALT+DOWN Drag down from box	Insert a new box below the Current Box.
	Insert Left	ALT+LEFT Drag left from box	Insert a new box to the left of the Current Box.
	Insert Right	ALT+RIGHT Drag right from box	Insert a new box to the right of the Current Box.
	Box Text	ENTER Double click on box	Edit the text within the Current Box.
✖	Mark Boxes	CTRL+M	Marks selected boxes as exceptions to the Layout rules.
	Delete	DEL	Delete selected boxes.
	Swap	CTRL+W	Swaps the positions of two boxes.
⬩	Select All	CTRL+A	Select all boxes.
⬩	Select Level	CTRL+H	Select all boxes at the same level as the Current Box.
⬩	Select Subord	CTRL+I	Select all boxes directly below the Current Box.
⬩	Select Sub-Tree	CTRL+T	Select Current Box, and all boxes below it.
	Select Marked		Selects boxes with specific marker settings.
	Clear Selections	CTRL+G	De-select all selected boxes.

View menu

	Toolbar	SHIFT+F2	Show or hide the Toolbar.
	Status Bar	CTRL+F2	Show or hide the Status Bar.
△	View All	CTRL+Q	Show all boxes, by removing Focus & expanding collapsed boxes.
▲	Focus	CTRL+F	Focus on Sub-Tree or the whole chart.
▲	Collapse	CTRL+K	Collapse selected boxes, making boxes below them hidden.

◮	<u>Expand</u>	CTRL+E	Expand selected boxes, revealing hidden boxes.
◭	<u>Expand All</u>	CTRL+SHIFT+E	Expand all collapsed boxes, revealing hidden boxes.
	<u>Zoom In</u>	+	Zoom in, to magnify a portion of the chart.
	<u>Zoom Out</u>	-	Zoom out, to see more of the chart.
	<u>Zoom Normal</u>	=	Restore to 100% zoom.

Layout menu

L	<u>Define Layouts</u>	CTRL+D	Define Layouts.
ᴬᴮC	<u>Text Styles</u>	CTRL+Y	Change the text style of any field within any Layout.
	<u>Edit</u>	SHIFT+ENTER SHIFT+double click on box	Edit the Layout used by the Current Box.
	<u>Size</u>	F8	Modify the box size rules of the Layout used by the Current Box.
	<u>Spacing</u>	SHIFT+F8	Modify the spacing rules of the Layout used by the Current Box.
	<u>Use Default</u>	CTRL+U	Selected boxes use their Default Layouts.
	<u>Defaults</u>		Define a default Layout for each level in the chart.
	<u>Delete Unused</u>		Delete unused Layouts.

Chart menu

	<u>Define Fields</u>	F3	Define box text fields.
	<u>Border Fields</u>	SHIFT+F3	Define Border text fields.
	<u>Border Text</u>	F7 Double-click on chart background	Edit Border text.
	<u>Border Layout</u>	SHIFT+F7 SHIFT+ double-click on chart background	Modify the Border Layout.

<u>Border Margins</u>	CTRL+F7	Modify Border margins.
<u>Match Box Sizes</u>		Change the box size-matching rules.
<u>Page Setup</u>		Change page margins and print style.

Window menu

<u>Cascade</u>	Arranges windows in an overlapped fashion.
<u>Tile Horizontal</u>	Arranges chart windows side by side.
<u>Tile Vertical</u>	Arranges chart windows stacked vertically.
<u>Arrange Icons</u>	Arranges icons of minimized chart windows.
<u>Window 1, 2, ...</u>	Goes to specified chart window.

Help menu

<u>Contents</u>	CTRL+F1	Offers you an index to topics on which you can get Help.
<u>Search for Help on</u>		Allows you to select Help by keyword.
<u>How to Use Help</u>		Provides general instructions on using Help.
<u>Register</u>		How to purchase a license to continue using TreeChart after the 30-day evaluation period.
<u>About</u>		Displays TreeChart version number and copyright.

Contents for TreeChart Help

TreeChart is a program you can use to quickly create and print organization charts, or similar hierarchical arrangements.

To learn how to use Help, press F1

This is the shareware, or evaluation, version of TreeChart. It is full featured, with no missing functions except that it cannot open charts saved by a previous version of the program.

If you feel TreeChart meets your needs and you wish to continue using it beyond the 30-day evaluation period, you must purchase a license by registering the program. To see registration costs and procedures, from the Help menu choose Register.

Getting Started
Getting Help in TreeChart
The steps involved in preparing charts
Boxes and Layouts
Working in a chart window
Moving around a chart
Inserting Boxes
Selecting Boxes
Using a mouse in a Chart Window
Outlining
Zooming the Chart Display
Marking boxes as exceptions to the rules
Printing charts
Adding titles and a border
Speeding up your work with Template Files
The benefits of registration

Reference
Commands - Quick Reference
Keyboard Shortcuts
Defined Terms

The Toolbar
File menu
Edit menu
View menu
Layout menu
Chart menu
Window menu
Help menu

Help Menu commands

The Help menu offers the following commands, which offer you assistance with TreeChart:

Contents	Offers you an index to topics on which you can get help.
How to Use Help	Provides general instructions on using help.
Search for Help On	Allows you to search the online help for particular keywords.
Register	How to purchase a license to continue using TreeChart after the 30-day evaluation period.
About	Displays the version number of this application.

See Also

Getting Help in TreeChart

Register command (Help menu)

TreeChart is **not** free. It is **not** public domain. Just like a computer program costing ten times as much, it is copyrighted by its owners, and you must purchase a license to use it.

Unlike a computer program costing ten times as much, you have the chance to try the program before you commit yourself to purchasing the license. This 'try before you buy' concept is termed **Shareware**.

In essence, FineLine Software are granting you a limited-time trial-use license to evaluate this program to determine if it meets your needs. If, after 30 days, you wish to continue using this program, you must purchase a full license for continued usage. This process is termed Registration.

Use this command to register.

See Also
　　Registration dialog box
　　The Benefits of registration

Registration dialog box

If you wish to continue using TreeChart after the 30-day evaluation period, you must purchase a license by registering. The Registration dialog informs you of the various ways of registering, and the costs involved with each. The dialog can also print an order form if needed.

Site licenses and volume discounts are also available - contact FineLine Software for details.

The two choices you must make are:

1. The payment method.
2. Where we're shipping the registration package to.

Your choice in the **Payment Method** list determines who you should place your order with, and the currency that prices are quoted in. You can order direct to FineLine Software from anywhere in the world, but customers in the U.S.A. or Australia may find it more convenient to order through our local registration agents. Customers who are members of CompuServe can register online.

Your choice in the **Location** list determines postage costs and VAT (sales tax). All registration packages are shipped by airmail post from Ireland. VAT is only significant if we are shipping within the European Union.

Ordering by phone / E-mail

If you have a credit card, you can phone or E-mail your order. There's no need to complete the remaining fields in the dialog, but you'll need to provide this information when placing your order.

Ordering by post / fax

Please complete all applicable fields. Choose the **Print** button to print a pro-forma invoice / order form. Please use this printed form, rather than a handwritten order, since it makes it much more likely that we'll get all the details correct. If you chose to pay by credit card, you'll need to add your credit card details to the printed form.

A customer comment form is also printed. Your feedback helps us to improve the program, the documentation and our distribution methods. If you don't wish to make any comments, you could just print the first of the two pages.

You cannot print the forms unless you complete the **Name**, **Address** and **Country** fields.

See Also
    The Benefits of registration
    VAT
    Customs Duties
    Price Stability

Value Added Tax

VAT is the European Union term for a sales tax. All sales are subject to Irish VAT, but the rate used depends on a number of factors.

The main factor is where we're shipping to, as indicated in the **Location** list in the Registration dialog:

- If we ship outside the E.U. (**Rest of Europe** or **Rest of the World**), the rate is 0%

- If we ship within the **Republic of Ireland** the rate is 21%

- If we ship to another E.U. state (**United Kingdom** or **Rest of European Union**), the rate depends on whether or not **you** are registered for VAT. If you are registered, the rate is 0%; if you are not registered, the rate is 21%.

For shipments to E.U. states other than Ireland, VAT will be added at 0% only if you advise us (when ordering) of your VAT Registration number. If you print an order form, space is provided for you to add this.

Note that postage charges reflect actual costs and are charged separately. They are therefore not liable to VAT.

A VAT invoice is included in the registration package for all orders shipped within the E.U.

VAT rates and legislation are subject to change.

Australian Registration Agent

Customers in Australia,   New Zealand or the Pacific Islands may find it convenient to register through our local agent:

Budgetware
PO Box 496
Newtown, NSW 2042

voice: (02) 519-4233
fax: (02) 516-4236

Budgetware accept the following credit or charge cards: Bankcard, Mastercard, Visa. Budgetware also accept mailed orders with an Aus$ cheque drawn on an Australian bank or money orders. These should be made out to "BUDGETWARE".

The above phone numbers are for **orders only**. Any questions about the status of the shipment of the order, refunds, registration options, product details, technical support, volume discounts, dealer pricing, site licenses, etc, must be directed to <u>FineLine Software</u>.

Orders placed through our Australian agent are E-mailed to us the day you order. Your registration package will then be dispatched by airmail post within 48 hours. Please allow a total of 15 days for delivery.

Registering direct to FineLine Software

FineLine Software can accept worldwide orders by a number of methods.

FineLine Software
Newtown,
Kinvara,
Co. Galway,
Republic of Ireland

voice/fax: +353 91 37560
CompuServe: 70624,462
E-mail: fineline@iol.ie

FineLine Software accept the following credit cards: Mastercard, Access, Visa and Eurocard.
FineLine Software also accept mailed orders with Irish cheques, Sterling cheques,
eurocheques and International Postal Money Orders.

Your registration package will be dispatched by airmail post the day after receipt of order.
Delivery should be 5-10 days later.

U.S.A. Registration Agent

Customers in the U.S.A. may find it convenient to register through our local agent:

> Public (software) Library
> PO Box 35705
> Houston, TX 77235-5705
>
> toll-free: 1-800-2424-PsL
> voice: 713-524-6394
> fax: 713-524-6398

When ordering, please quote item #11053.

PsL accept the following credit or charge cards: Mastercard, Visa, Amex and Discover. PsL also accept mailed orders with a US$ check drawn on a US bank, payable to "Public (software) Library".

The above phone numbers are for **orders only**. Any questions about the status of the shipment of the order, refunds, registration options, product details, technical support, volume discounts, dealer pricing, site licenses, etc, must be directed to FineLine Software.

Orders placed through our U.S. agent are E-mailed to us the day you order. Your registration package will then be dispatched directly to you by airmail post within 48 hours. Please allow a total of 15 days for delivery.

Registering via CompuServe

Customers who are members of CompuServe may find it convenient to register online, using the Shareware Registration database:

- Connect to CompuServe

- GO SWREG

- Follow the prompts

- TreeChart's Registration ID is 1927

The cost is charged to your CompuServe account, and will appear in your regular bill.

Orders placed through CompuServe are E-mailed to us the day you order. Your registration package will then be dispatched directly to you by airmail post within 48 hours. Please allow a total of 15 days for delivery.

The Benefits of Registration

As well as the legal right to use TreeChart after the 30 day evaluation period, registration brings you:

- Printed and bound User Guide plus Tutorial
- The most recent copy of the program
- Lifetime support and a money-back guarantee
- 'Unregistered version' messages now show that you're another honest shareware user
- Support if file format changes
- Registration remains valid for minor upgrades
- Notification of both minor & major upgrades
- Automatic (& free) re-registration if a major upgrade is released within six months
- Its the right thing to do

Refer to the User Guide for details of our upgrade and support policies.

Changes to the .TCF file format

We aim to continuously improve TreeChart, and in so doing it may be necessary to change the way we store your information. This is of no consequence during an evaluation period, but becomes significant if you wish to read files saved under an old version of TreeChart into a newer version. The registered version of TreeChart contains code to automatically detect and handle format changes, unregistered versions omit this code, and can only report an error if you request an old-format file to be loaded.

Association of Shareware Professionals
MEMBER

TreeChart is produced by a member of the Association of Shareware Professionals (ASP). ASP wants to make sure that the shareware principle works for you. If you are unable to resolve a shareware-related problem with an ASP member by contacting the member directly, ASP may be able to help. The ASP Ombudsman can help you resolve a dispute or problem with an ASP member, but does not provide technical support for member products. Please write to the ASP Ombudsman at 545 Grover Road, Muskegon, MI   49442-9427 U.S.A. or send a CompuServe message via CompuServe Mail to ASP Ombudsman 70007,3536. The OMB may be contacted by FAX by sending to the ASP FAX number: (+1) (616) 788-2765. In communication with the OMB please include a telephone number and/or FAX if available.

See Also
Register command

Customs Duties

Customers outside the European Union may have to pay customs duties to import our product into their country.

We ship by airmail post. This will often be regarded as personal mail, and not dutiable. Where customs duties are payable, we minimize them by itemizing the package contents on the customs declaration form:

disk:	US$1
book:	US$8
intellectual property license:	US$33

We understand that in most cases only the disk will be dutiable. In some cases, the book (manual) will be. Almost never are intellectual property licenses dutiable.

Rates and regulations vary between countries: to avoid unexpected costs, you should enquire at your local customs office.

Price Stability

Where possible, we will honor the total cost indicated in the Registration dialog for two years after the release date.

If you see a message warning you that you are running an old version of TreeChart when the program starts, then your copy was released at least two years ago, and prices may have changed. You should contact us (or our local agents) for current prices, or obtain an up-to-date copy of the program.

A significant change in VAT rates or legislation is probably the only thing that would cause us to have to change the total cost within two years of the release date.

See Also
    Registration dialog box
    VAT