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ORG PLUSTM

For Macintosh[®]

The #1 Selling Organization Chart Maker

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ORG PLUSTM

For Macintosh[®]

USER'S TUTORIAL & REFERENCE MANUAL

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Fremont, California**

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First Edition (October 1990)

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Contents

Chapter 1: Introduction 1

About this program 1

What's in this manual 5

Chapter 2: Getting Started 7

What you should know 7

If something goes wrong 7

Installation 7

How to get help 14

On-line help 14

Helpful prompts and messages 15

Customer assistance 15

Thank you 16

Where to go from here 16

Starting the program 17

Chapter 3: Learning Org Plus 21

Part I: Creating a chart 22

Creating boxes 25

Changing group styles 31

Deleting boxes 34

Finishing the chart 35

End of Part I 36

Part II: Completing a chart 37

Getting started 38

Changing box styles 40

Changing the label setup for selected boxes 43

Entering information 47

Annotating the chart 47

End of Part II 50

Part III: Updating a chart 51

- Getting started 52
- Moving boxes 54
- Changing the label setup 58
- Entering information 59
- Creating subgroups 61
- Making it fit on one page 63
 - Changing group styles 64
 - Changing the page orientation 66
 - Using the Make Fit command 67
 - A word about the Make Fit command 70
- End of Part III 70
- What to do next 71

Chapter 4: Using Org Plus 73

Creating a new chart 74

- Creating a chart from scratch 74
- Using stationery to create a chart 78

Creating and deleting boxes 79

- Creating any type of a box 80
- Creating multiple boxes of the same type 81
- Inserting managers 82
- Converting boxes from one type to another 82
- Alternate ways to create boxes 83
- Deleting boxes 84

Entering information 84

- Entering new information 84
- Editing existing information 85
- Editing shortcuts 85
- Entering people's names 86
- Seeing and editing information not shown in your chart 86

Selecting boxes and lines 88

- Selecting a single object 89
- Selecting multiple objects 89
- Selecting all objects of the same type 90
- Selecting a group 90
- Selecting a branch 90
- Selecting all boxes at the same level 91
- Selecting all boxes 92
- Keyboard shortcuts for selecting boxes 92

Viewing and moving around your chart 93

Viewing your chart at actual and reduced sizes 93

Using the Reduce/Enlarge tool 94

Moving left, right, up, or down 95

Keyboard shortcuts for viewing and moving 95

Changing the label setup 96

The Label Setup dialog box 98

How to change the label setup 99

Creating labels 100

Creating additional label areas 100

Deleting label areas 102

Moving labels 102

Hiding and showing labels 104

Creating dividing lines 106

Changing margins within a box 107

Changing labels 107

Renaming labels 108

Deleting labels 108

Formatting people's names 108

Showing labels in your chart 109

Copying the label setup 109

Rearranging boxes in your chart 110

Changing group styles 111

Creating subgroups 111

Changing subgroup styles 112

Merging subgroups 112

Changing assistant styles 113

Creating co-managers 114

Moving boxes in your chart 115

Moving boxes 115

Gathering scattered boxes under a single manager 117

Replacing box contents 118

Moving and centering your chart 118

Changing the distance between boxes 119

Using the Spacing dialog box 119

Changing the length of connecting lines 120

Changing distances by dragging 120

Making boxes larger or smaller 123

Making boxes as narrow as possible 124

Making boxes as short as possible 124

Making boxes as small as possible 124

Giving a box a fixed size 124
Restoring automatic sizing 126

Changing text, lines, and box styles 127

Changing text fonts, styles, and sizes 128
Changing text alignment 128
Wrapping text across lines 128
Moving text 129
Changing people's name formats 129
Changing the label setup in order to change text 130
Changing box borders and shadows 132
Changing line thickness and style 132

Making your chart more compact 132

Making your chart narrower 134
Making your chart shorter 137
Making your chart narrower and shorter 137
Using the Make Fit command 139
Reducing to fit 141
Selecting the Make Fit Options 142

Working with multiple charts 145

Cutting and pasting between charts 145
Creating books of charts 148

Special effects through showing and hiding 149

Showing/hiding boxes 149
Showing/hiding branches 150
Showing/hiding connecting lines 151
Showing/hiding page lines 152

Special effects through manual drawing 153

Displaying the drawing tools 154
About the drawing tools 154
Using the Rectangle tool 155
Using the Perpendicular Line tool 156
Using the Diagonal Line tool 157
Using the Connecting Line tool 158

Annotating your chart 161

Creating titles 162
Creating annotations 163
 Resizing annotation areas 163
 Drawing boxes around annotations 164

Pasting pictures into your chart 165

Printing your chart 166

Customizing Org Plus 167

Creating your own stationery 167

Opening stationery 168

Changing preset options 169

Changing your chart margins 172

Chapter 5: Reference 177

The Chart window 177

The tool palette 178

The Apple menu 180

About Org Plus... 180

The File menu 181

New 181

Open... 182

Close 183

Save As... 183

Save 183

Save Stationery... 184

Revert to Saved... 184

Page Setup... 185

Print... 185

Quit 185

The Edit menu 186

Undo 186

Cut 186

Copy 186

Copy Setup 186

Paste 187

Clear 187

Select 187

Select Levels... 188

Label Setup... 188

Preferences 189

The Styles menu 190

The Text menu 191

Fonts 191

Style 191

- Text sizes 192
- Other... 192
- Left, Right, and Center 192
- Name 193
- Word Wrap 193

The Boxes menu 194

- Box Border 194
- Box Shadow 195
- Line Thickness 195
- Line Style 196
- Show/Hide Box 196
- Show/Hide Branch 196
- Spacing... 197
- Auto Width 197
- Auto Height 198
- Manual Size... 198

The Chart menu 199

- Make Fit... 199
- Size to Window 201
- 50% of Actual 201
- Actual Size 201
- Show/Hide Edit Panel 202
- Show/Hide Page Lines 202
- Show/Hide Symbols 203
- Show/Hide Draw Tools 203
- Center Up/Down 203
- Center Left/Right 203

The Help menu 204

Appendix A: The Art of Charting 207

Appendix B: Time Saving Measures 211

Appendix C: Keyboard & Mouse Shortcuts 215

- Creating boxes 215
- Viewing your chart 216
- Selecting and editing boxes 217
- Making dialog box selections 217
- Using the modifier keys with the mouse 218
- File operations 218

Appendix D: Operating Limitations 219

Appendix E: Using Org Plus with Other Applications 221

Opening Org Plus for IBM documents 221

Differences between IBM and Macintosh versions 222

Saving as Org Plus for IBM 223

Opening Text documents 224

Saving as a text document 227

Copying and pasting between applications 228

Glossary 229

Picture Index 233

Index 241

Chapter 1: Introduction

Thank you for buying Org Plus for Macintosh.

This chapter introduces you to the basic features of Org Plus and gives a summary of the information in this manual.

About this program

Org Plus helps you create professional looking organization charts quickly and easily. You can create almost any type of tree diagram. You can also chart virtually any information that you can put into outline form. Check the Samples folder on your Org Plus Help & Learning disk.

Fast chart creation

Click a box tool at the top of the chart window, then click where you want the boxes. Org Plus automatically draws them, spaces them evenly, and precisely lays out the connecting lines. See Figure 1-1.

*Click the Subordinate
box tool 4 times...*

*...then click the
manager's box
once...*

*...to create
4 subordinate
boxes*

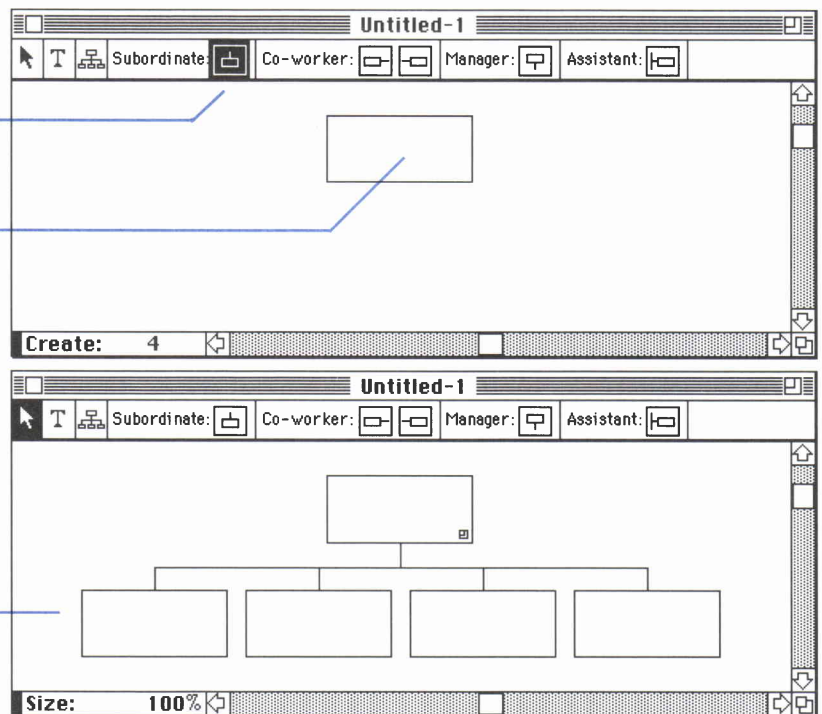


Figure 1-1. Creating boxes and lines

To enter your data, you click in the boxes and type. Org Plus automatically positions the text and grows or shrinks your boxes as you type — you don't have to worry about resizing them, as you would with a general purpose drawing program.

You can also change box borders, apply shadows, and change the thickness and style of lines with simple menu selections.

Flexible, automatic formatting

Rearrange any group of boxes instantly with a single menu selection. Select the boxes you want to rearrange, then choose a style from the Styles menu. Any group of boxes can have any style (see Figure 1-2).

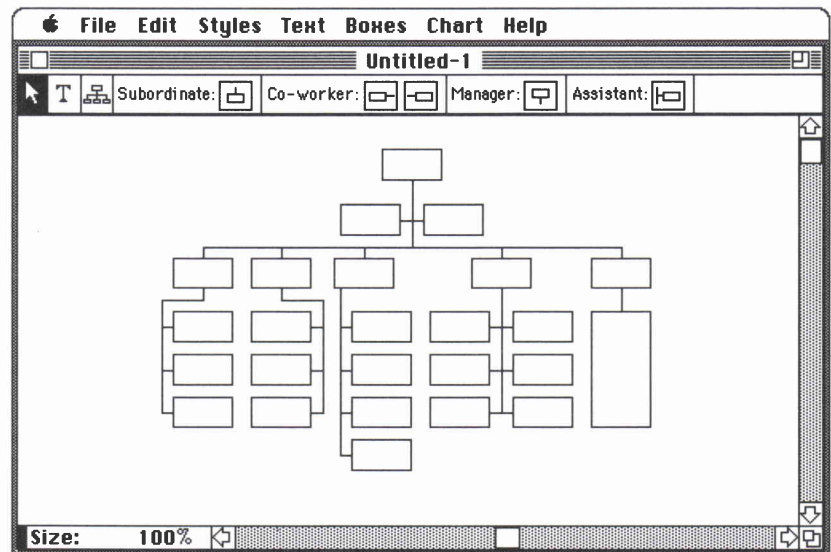
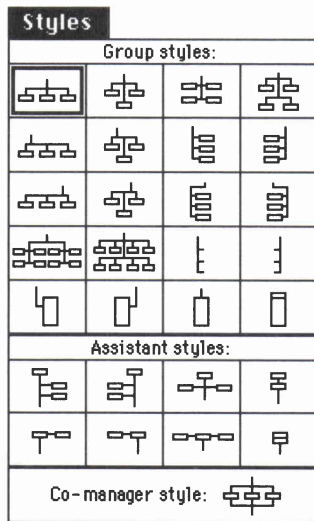


Figure 1-2. Arrange boxes however you want

You can even create your own styles by using the hidden boxes feature. You have control over virtually every aspect of your chart's appearance.

Fast updating

Charts are easily updated to keep pace with changing organizations. You can cut and paste boxes anywhere in your chart. You can also drag them to any location.

You can easily rearrange the information, too. For example, you can place name above title when you create your chart, then later decide you want title above name. Simply reverse the order of the labels in the Label Setup dialog box (Figure 1-3), and the order is reversed throughout the entire chart.

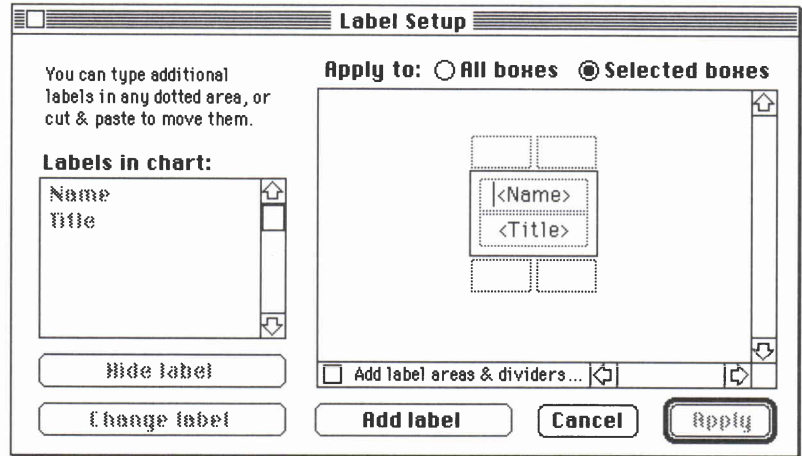
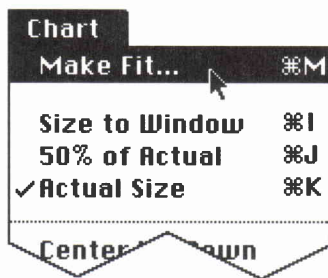


Figure 1-3. The Label Setup dialog box

No matter what changes you make, Org Plus automatically preserves uniform sizing and spacing. Any you always see exactly what the chart will look like when printed!

Compact charts



Most people want to see as much of an organization on one page as possible. Compact charts are also much easier to copy and distribute.

Org Plus arranges boxes to save as much space as possible. It even has a special feature, the Make Fit command, that can make your chart fit on one page in a single operation.

Tell Org Plus how many pages on which to fit your chart and Org Plus does the rest automatically. And if Org Plus *can't* make it fit, it tells you precisely how much more you need to reduce it to make it fit. You can then use the reduction feature on the Macintosh (at the Page Setup dialog box) or on a photocopier machine.

Custom touches

Some charting effects can't be created automatically, even by Org Plus. For example, you might want to include your company logo in the upper corner, or create a special boxed legend, or draw extra lines to separate different groups within the company. Org Plus provides a special set of drawing tools so that you can get precisely the effect you want.

Paste in your company's logo

Draw lines, boxes, and type text anywhere you want

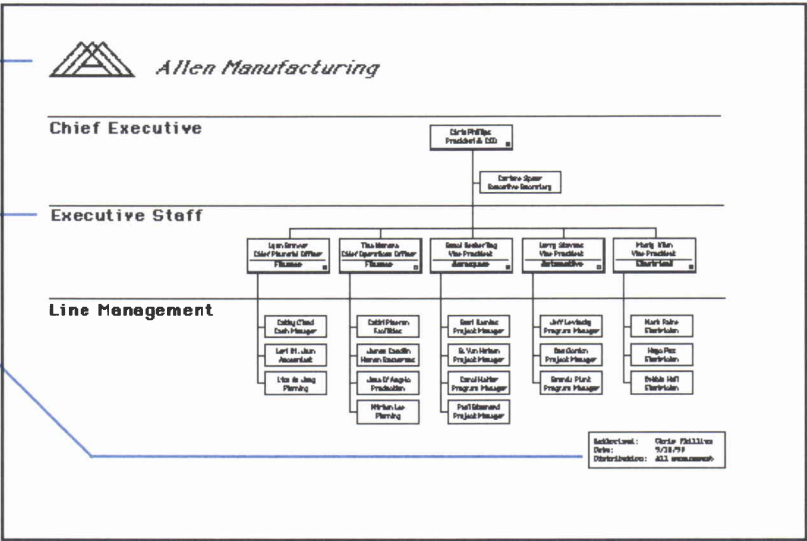


Figure 1-4. Chart with custom touches

For more information about the special drawing tools, see “Special effects through manual drawing,” page 153. See also the unique Picture Index at the back of this manual (page 233).

What's in this manual

This manual contains the information you need to create professional looking organization charts using Org Plus. The following table presents an overview of the major sections of the manual. Use it to help you find the information that is most important to you.

To do this...	Turn to this section...
Find out what this program can do for you	About this Program, page 1
Find out what you need to do to start using the program	Getting Started, page 7
Learn the basics	Tutorial, page 21
Get step-by-step instructions for each command	Using Org Plus, page 73
Get a brief description of every menu command, icon, or other object that you see on the screen	Reference, page 177
Get answers to a range of questions such as how to create professional looking charts, how to use the keyboard to save time, and so on	Appendixes A-E, pages 207-228
Get definitions for the most commonly used terms	Glossary, page 229
Look at examples of special effects that you can create with Org Plus	Picture Index, page 233
Find any particular item of information in the manual	Index, page 239

Chapter 2: Getting Started

This chapter takes you through the basic steps necessary to start working with Org Plus.

What you should know

This manual assumes you're familiar with basic Macintosh techniques such as *selecting*, *dragging*, and *double-clicking*. If you aren't, please refer to your Macintosh owner's manual before continuing.

You'll see the word "application" throughout this manual. You can think of it as a synonym for "program".

If something goes wrong

We want your first experience with Org Plus to be a successful one, so it's important that you follow the installation steps on the next page carefully.

In the event that you run into a problem and can't figure out what to do, please call our Technical Support department:

415-794-6850 (ask for Technical Support)

A trained technician will help you.

Installation

This section takes you through the five steps necessary to start working with Org Plus.

Step 1:

Check the system requirements

The following is the minimum hardware and system software you must have in order to use Org Plus:

- A Macintosh Plus, Macintosh SE, or Macintosh II series computer

- At least 1 megabyte of RAM
- A hard disk and at least one 800K floppy disk drive, or at least two 800K floppy disk drives
- Macintosh System version 4.1 or later

Your system must meet these minimum requirements in order for Org Plus to install and operate properly.

Step 2:

Check your package contents

This package should contain:

- Two Org Plus disks
- A registration card
- The Org Plus User's Manual (you're looking at it now)

If anything is missing, contact your dealer for a replacement package.

Step 3:

Complete and mail your registration card

Please fill out and return the Registration Card now! Registration entitles you to the following benefits:

- Free telephone support on using Org Plus
- Notification of program updates
- Special discounts on upgrades and other products
- Notice of future products and services from Banner Blue

About mailing lists

We currently do *not* provide our mailing list to other companies, and have no intention of doing so. You can be assured that your name and address will be kept confidential and used only by Banner Blue.

Step 4:

Make a working copy of the program

It is *very important* that you only use a working copy of the program in case your disk is lost or damaged. You should *never* use your original *Org Plus Program* disk for day to day use. Store it in a safe place (Step 5) so that you'll have it to make additional working copies if needed.

The write-protect tabs on your original Org Plus disks have been adjusted to protect the documents on them from accidental erasure. It's a good idea to leave them this way.



About copy protection: For your convenience, the *Org Plus Program* disk is NOT copy protected. Your license entitles you to make two working copies of the *Org Plus Program* disk for your own use. See the license agreement inside the front cover for details.

With a hard disk

To install Org Plus on a hard disk, copy the documents from both Org Plus disks into a folder on your hard disk:

1. Turn on your Macintosh and the hard disk, if necessary.

You should see a window containing the documents and folders on your hard disk. If not, the hard disk isn't open: double-click the hard disk icon (probably in the upper right corner of the screen) to open it.

2. Choose New Folder from the File menu.

You should see "Empty folder" in the window.

3. Type Org Plus.

4. Choose Open from the File menu to open the disk window.

5. Insert the *Org Plus Program* disk into the floppy drive.

The *Org Plus Program* disk window should appear on your screen. If not, the disk isn't open: double-click the *Org Plus Program* disk icon.



6. **Drag the Org Plus application icon from the *Org Plus Program* disk window into the new *Org Plus* window.**

The Org Plus application icon is shown to the left.

This puts a copy of the Org Plus application in the newly created Org Plus folder.

7. **Drag the *Org Plus Program* disk over the trash can icon to eject it.**

Don't worry: This doesn't harm the disk in any way.

8. **Insert the *Org Plus Help & Learning* disk into the floppy drive.**

The *Org Plus Help & Learning* disk window should appear on your screen. If not, the disk isn't open: double-click the *Org Plus Help & Learning* disk icon to open it.

9. **Drag everything from the *Org Plus Help & Learning* disk window into the new *Org Plus* window.**

See Figure 2-1 on page 12 for a picture of what should appear in your new Org Plus window.

10. **Drag the *Org Plus Help & Learning* disk over the trash can icon to eject it.**

You have now installed Org Plus on your hard disk. Skip ahead to "What's on your disk," page 12, to continue with the installation.

With two 800K drives

If you have a Macintosh with at least two 800K floppy disk drives and no hard disk, you can use two disks to run the program:

- A System disk to start your Macintosh and to store your documents
- A disk containing the Org Plus application

You should already have a System disk. Your Macintosh owner's manual tells you how to create additional System disks, if necessary. You may want to create a copy of your System disk with the minimum number of documents on it in order to have as much space as possible for your Org Plus documents.

To make a working copy of the *Org Plus Program* disk, copy the contents from the Program disk onto a separate floppy disk:

1. **Turn on your Macintosh.**
2. **Insert your *System Tools* disk into the internal drive.**

On a Macintosh with two internal disk drives, you insert the disk in the topmost or righthand drive.
3. **Insert a blank initialized disk into the other floppy drive and name the disk “Org Plus”.**
4. **Open the new *Org Plus* disk.**
5. **Eject your *System Tools* disk.**
6. **Insert the *Org Plus Program* disk in the internal drive.**

The *Org Plus Program* disk window should appear on your screen. If not, the disk isn't open: double-click the *Org Plus Program* disk icon to open it.

7. **Drag the Org Plus application icon (see the figure to the left) from the *Org Plus Program* disk window to the *Org Plus* disk window you opened in step 4.**



This puts copies of the Org Plus application on the new disk. The new disk is your working copy.

8. **Drag your original *Org Plus Program* disk icon over the trash can icon to eject it.**



Don't worry: this does *not* erase the disk or harm it in any way. It's simply a convenient way to eject disks. You can use the Eject command from the File menu, but dragging to the trash clears the disk icon from the desktop and reduces the possibility of confusion in the steps that follow.

9. **Insert your *System Tools* disk in the internal drive.**
10. **Click the *Org Plus* disk window to bring it to the front.**

From now on, you should only use your working copy of Org Plus.

If you intend to use the Org Plus on-line help feature, you must put a copy of the Org Plus Help document on your System disk:

1. **Drag your *Org Plus* disk (your new working copy) over the trash can to eject it.**
2. **Insert the *Org Plus Help & Learning* disk.**
3. **Drag the Org Plus Help icon from the *Org Plus Help & Learning* disk window over the *System Tools* disk icon.**
4. **Drag the *Org Plus Help & Learning* disk over the trash can icon to eject it.**
5. **Insert your *Org Plus* disk (your new working copy) so that you'll be ready to start the application.**

You probably won't have enough room on your System disk to copy all the other documents from the *Org Plus Help & Learning* disk.

What's on your disk

Figure 2-1 shows what you should see when you open the Org Plus folder *on a hard disk*.

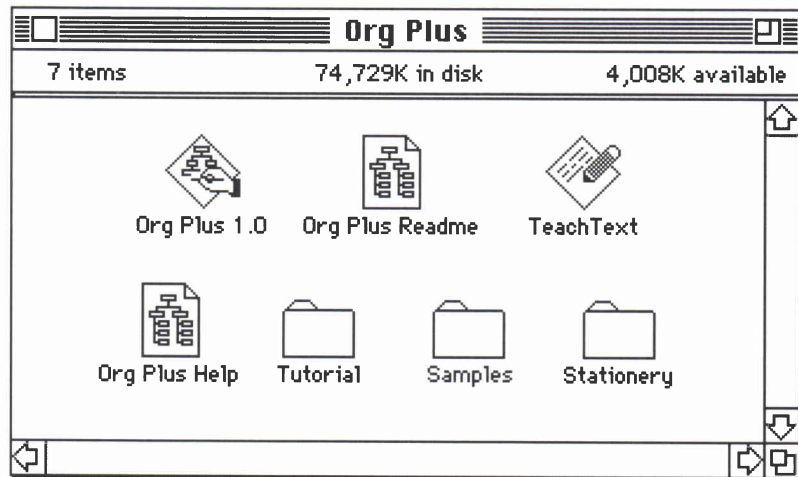


Figure 2-1. What's in your Org Plus folder on a hard disk

On a floppy disk, you'll see only the Org Plus application icon in the Org Plus window. All the other documents and folders described below are located on the *Org Plus Help & Learning* disk.

Here's a list of the icons you should see in the window, and the purpose of each:

Org Plus 1.0 is the application (the program). The number *1.0* is the version number. It signifies that this is the first release of the program. This is the only document you need to run Org Plus, unless you want to use the Org Plus on-line help feature.

Org Plus Help contains the text used by the Org Plus on-line help feature. For more information about this feature, see page 14.

Org Plus Readme contains last minute information that couldn't be included in the manual. After you complete step 5 below, you should double-click this icon to see what information it contains.

TeachText is an application that lets you open the Org Plus Readme document.

Tutorial is a folder containing charts used in the tutorial — Chapter 3 of this manual. You use these charts if you do the tutorial.

Stationery is a folder containing sample stationery charts for organizations of different sizes. Stationery is a special type of chart containing a basic chart design that you can modify to suit your needs. You can use any of these stationery charts for your own charts, or create your own stationery.

Samples is a folder containing sample charts.

If you don't see all these icons on your hard disk, restart your system and repeat the installation steps.

Step 5:

Store your original disks safely

Store your original Org Plus disks in a safe place. You can use them to make additional working copies if the one you just made becomes damaged.

That's all, folks!

That completes the installation. You're now ready to start using Org Plus to create your own organization charts. Take a look at the rest of this chapter for other sources of help, then decide where to go from there.

How to get help

In addition to this manual, you have three sources of help for using Org Plus:

- Org Plus's on-line help feature
- On-line prompts and messages
- Banner Blue's telephone support

On-line help

On-line help gives you help on the screen for almost anything you may want to do. It's like having a manual on the screen.

You can get help in three ways — by making a choice from the Help menu, by pressing Command-H, or by pressing Command-?.

The Help menu

The Help menu (Figure 2-2) gives you immediate answers to some of the most commonly asked questions about Org Plus.

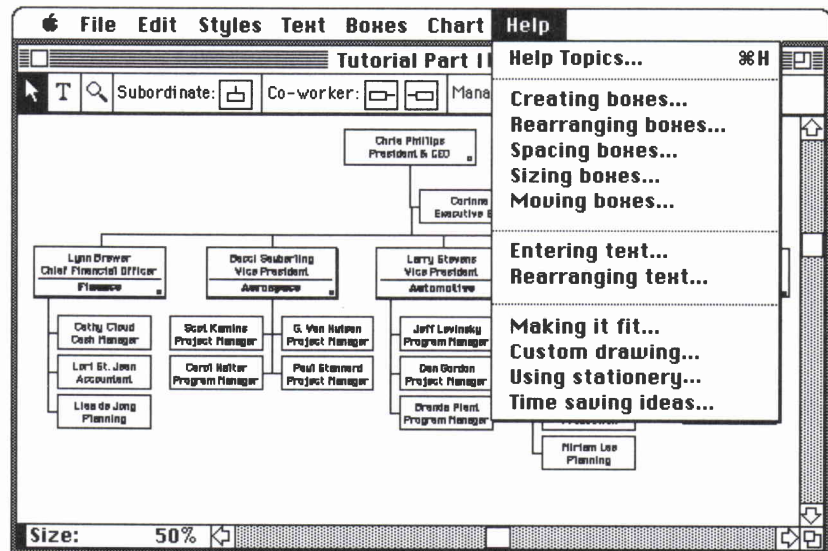


Figure 2-2. The Help menu

Command-H: instant help

You can type Command-H (press and hold down the Command key while you press "H") to view a window with an index of help topics.

You can drag the Help window to the side so you can consult it while you work.

Command-?: help pointer

You can type Command-? for a help pointer, then choose any menu command or click any icon for which you want an explanation.

All help text is cross-referenced to the manual so you always know where to go for more explanation.

Helpful prompts and messages

Ever get frustrated because a menu command that you needed was dim and couldn't be selected? Whenever possible, Org Plus lets you make the selection, and, if necessary, tells you what you need to do to make the command work.

Feel free to experiment. Org Plus's plentiful prompts and messages often tell you exactly what you need to know in order to do what you want.

Customer assistance

If you have problems that you aren't able to solve by using the on-line help feature and by checking the index to this manual, call Banner Blue Technical Support. Our hours are Monday through Friday, 8:00 AM to 5:00 PM, Pacific time. Our telephone number is:

415-794-6850 (ask for Technical Support)

We can help you best if you call while you're at your computer. Please have ready the following:

- Your Org Plus User's Manual
- The product name and version number of the applications you're using at the same time as Org Plus (e.g., inits, desk accessories)
- A description of your computer hardware and system software configuration, including the version numbers of the System and the Finder

Thank you

All of us at Banner Blue hope that Org Plus will become your favorite Macintosh application. Please write us to let us know how we can make it better. Our address is:

Banner Blue
Technical Support
P.O. Box 7865
Fremont, CA 94537

Where to go from here

At this point, you're ready to start using Org Plus. You can plunge right in and start making your own chart. If you get stuck, use the on-line help feature (page 14) or refer back to this manual.

However, we recommend the following:

- **Go through the tutorial (page 21). This introduction to the program takes you through the basic steps necessary to create a chart.**
- **Browse through Chapter 5 to get an overview of the Org Plus menus and dialog boxes.**
- **Take a quick look at some of the sample charts (in the Samples folder).**
- **Start making your own chart. If you get stuck, use the on-line help feature (page 14) or refer to Chapter 4 for step-by-step instructions.**

Happy charting!

Starting the program

To start Org Plus and begin working on a chart, double-click the Org Plus application icon in the Org Plus window.

Personalize your copy of the program

If you're starting Org Plus for the first time, Org Plus displays a dialog box so that you can personalize your copy of the program (Figure 2-3).

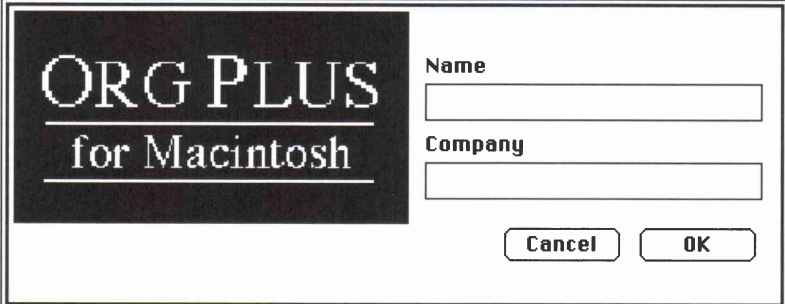
A Macintosh-style dialog box titled "ORG PLUS for Macintosh". The title is in a serif font, with "ORG PLUS" on the top line and "for Macintosh" on the line below, separated by a horizontal line. To the right of the title area are two text input fields. The first field is labeled "Name" and the second is labeled "Company". Below these fields are two buttons: "Cancel" and "OK".

Figure 2-3. Enter your name and company's name

Here's how to personalize your copy:

- 1. Type your name and your company's name. Press the Tab key to go from one box to the other.**

You only have to do this once. In the future, when you start the program, this dialog box will be displayed momentarily while the application loads into your computer's memory.

- 2. Click OK to continue.**

The Org Plus Startup dialog box appears (Figure 2-4 or 2-5).

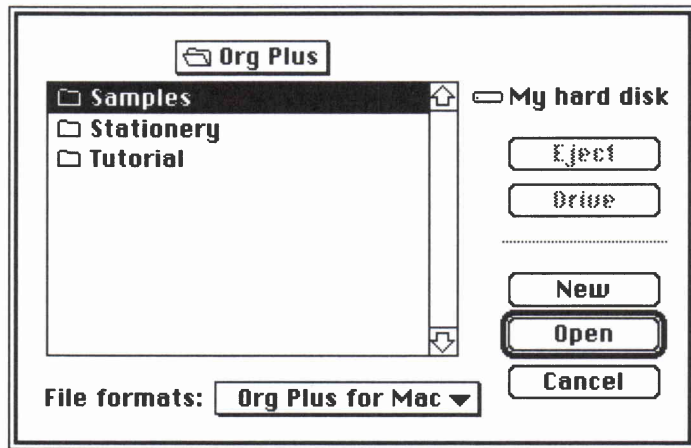


Figure 2-4. The Startup dialog box on hard disk systems

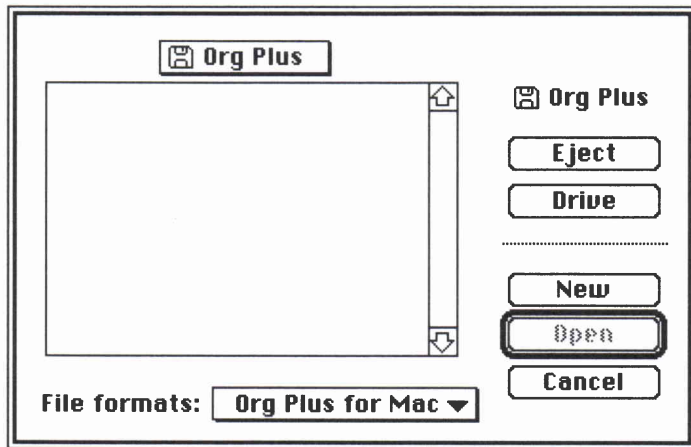


Figure 2-5. The Startup dialog box on floppy disk systems

You can create new charts or open existing ones from the Startup dialog. The tutorial also begins at the Startup dialog (page 21).

Chapter 3: Learning Org Plus

This tutorial takes you step by step through the process of creating and updating an organization chart. You'll learn many of the Org Plus commands and options as you go.

The tutorial is divided into three parts:

- In Part I you'll create the boxes and lines for a mythical company: Allen Manufacturing.
- In Part II you'll enter some information and finish the chart.
- In Part III you'll update the chart to show changes in the organization.

Each part takes about 20 minutes to complete. You can do them in one sitting, or at different times. When you've finished, you'll be ready to make your own charts.

Before you start

This chapter assumes a few things:

- You know basic Macintosh skills — how to click, drag, cut and paste, and use the menus.
- Org Plus is already installed on your computer.
- The Org Plus application has been started.
- You have Geneva 9, 10, and 12 point fonts installed on your system.

If you don't know basic Macintosh skills, you might want to review your Macintosh owner's manual before continuing.

If you haven't installed and started Org Plus, go back and follow the instructions in Chapter 2.

If you don't have the indicated Geneva font sizes installed, you might consider reinstalling them (they should have come with your computer when you purchased it). See your Macintosh owner's manual for instructions. If you don't install them, the figures in the tutorial

will vary from what you see on your screen, but you'll be able to get through the tutorial.

Part I: Creating a chart

In this part of the tutorial you'll create the chart shown in Figure 3-1. You'll learn how to:

- Create and delete boxes and lines
- Change the way boxes are arranged
- See the entire chart in the window

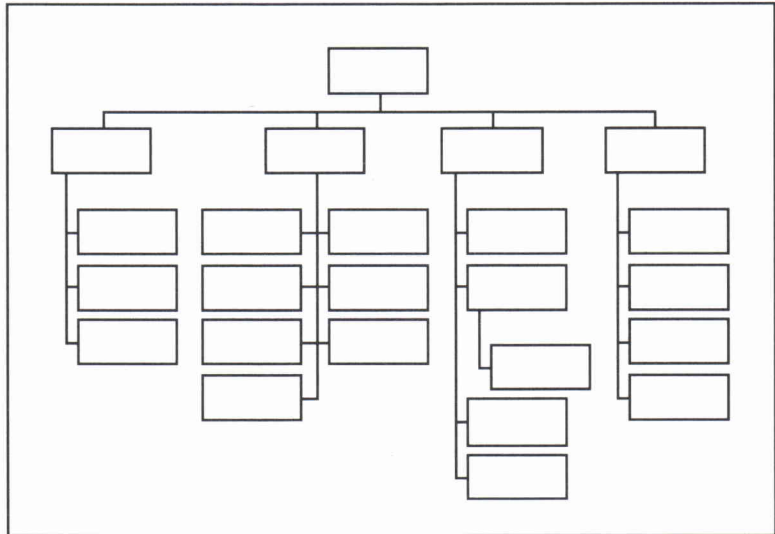


Figure 3-1. What you'll create in Part I

Creating a new chart

If you have just completed the installation and started the application (as described on page 17), your computer screen should show the Startup dialog box, shown in Figure 3-2 on page 23.

If not, start the application. (See “Starting the program,” page 17.)

If the application is already started but you don't see the Startup dialog box (Figure 3-2), quit the application and restart, according to

the instructions in “Starting the program,” page 17. To quit the application, choose Quit from the File menu.

These folders will not appear if you are working on a floppy disk

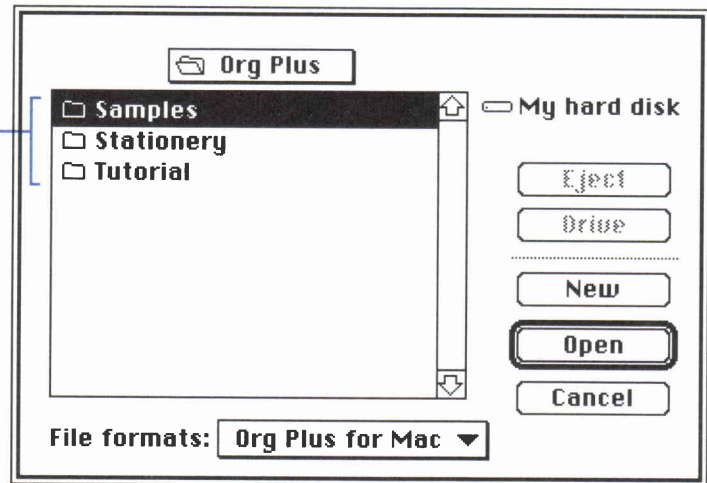


Figure 3-2. The Startup dialog box on a hard disk system

When you see the Startup dialog box (Figure 3-2) you're ready to begin:

1. **Click the New button in the Startup dialog box, as shown in the figure to the left.**



The New Chart dialog box appears (Figure 3-3).

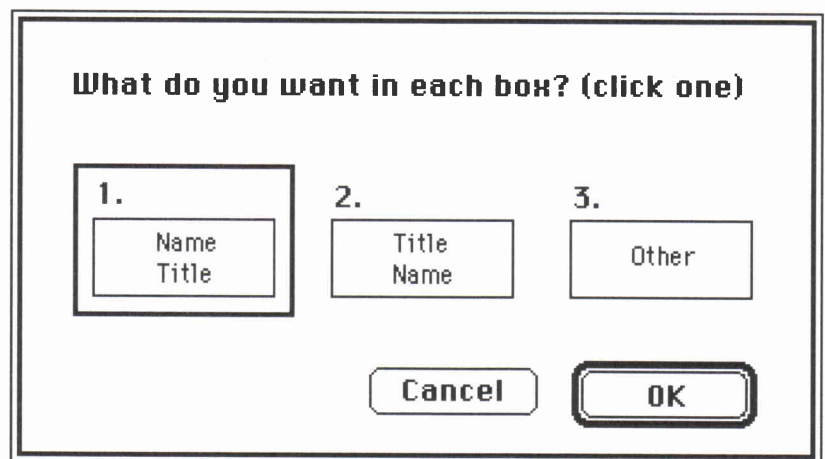


Figure 3-3. The New Chart dialog box

This dialog box lets you choose one of two different layouts (Name above Title, or Title above Name). You can select the third choice to create your own layout.

In this part of the tutorial, you'll use the first layout. You'll change it in Part II.

2. Click the OK button.

The dialog box goes away and you're ready to start typing.



The single box you see is the **topmost box**. All other boxes in the chart are subordinate to this box.

As you do the next step, watch the screen. You can press the Delete key to back up on a line and correct mistakes. The Delete key is located a couple rows above the Return key. On some keyboards it is called the Backspace key.

3. Type Chris Phillips.

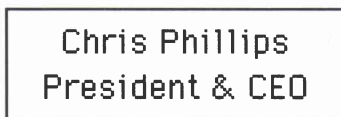
As you can see, the box grows automatically to accommodate the text as you type.

In general, you don't have to worry about changing the size of boxes. Org Plus takes care of it for you automatically.

4. Press Tab to highlight the next item — Title.

You can also press Return.

5. Type President & CEO.



The topmost box should now appear as shown in the figure to the left. If not, use the Tab and Delete keys to move between the two text values and make corrections.

You've now finished entering information in the topmost box. You enter information in other boxes in the same way. You'll enter a little more information in Part II of the tutorial.

Creating boxes

In this section you'll see how to create all the boxes that you need for the chart.



When you create your own chart: Although you can enter information for each box as you create it, you might find it easier to create the boxes first, then enter information later. That's what you'll do in this part of the tutorial.

Creating the assistant box

First, you'll create the box for the President's assistant:

1. **Click the Assistant box tool once, as shown in Figure 3-4.**

The Assistant box tool

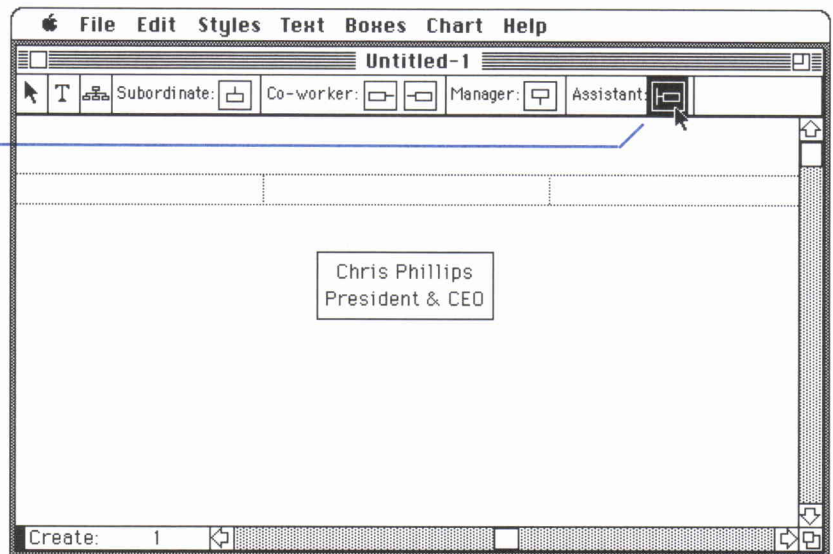


Figure 3-4. Clicking the Assistant box tool

2. **Click the President's box.**

The assistant is an assistant *to* the President, so you click the President's box.

If your chart doesn't look like the one in Figure 3-5 on page 26, choose Undo from the Edit menu and repeat steps 1 and 2.

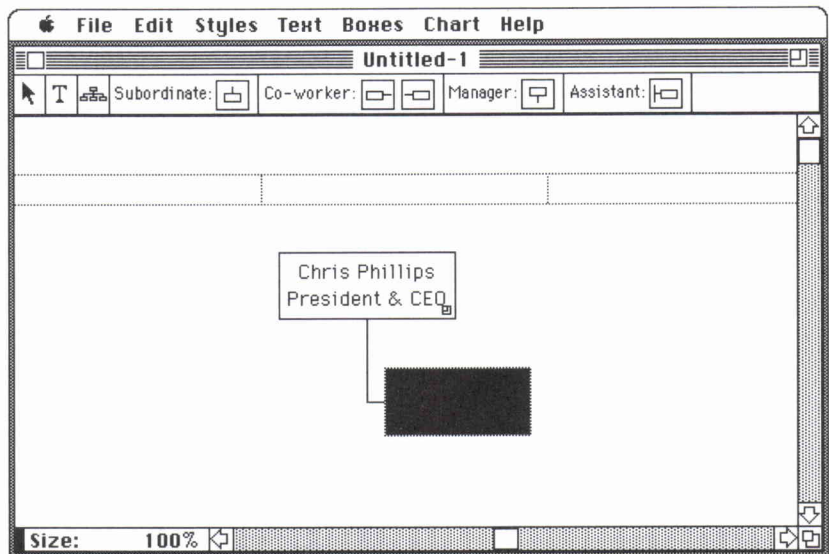


Figure 3-5. After creating the assistant

As you can see, Org Plus draws the assistant box and the connecting lines automatically.



Key concept: Each box is *attached* to another box. When you create a box, you have to *click the box to which you want it attached*.

Creating other boxes

In addition to his assistant, the President has an executive staff of four people — called **subordinates**. You'll create their boxes next.

1. **Click the Subordinate box tool once, as shown in Figure 3-6.**
2. **Click the President's box.**

Your chart should appear as shown in Figure 3-7. If not, choose Undo from the Edit menu and repeat steps 1 and 2.

Next, you'll create the other three executive staff boxes.

The Subordinate box tool

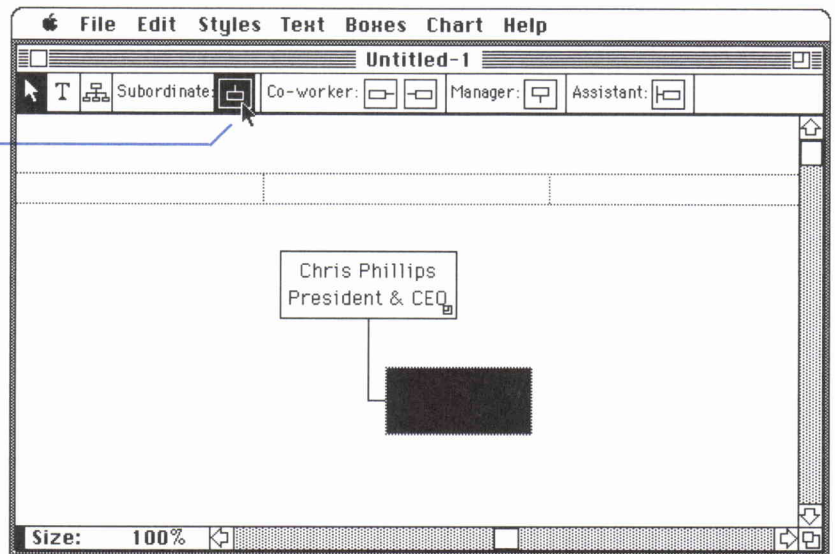


Figure 3-6. Clicking the Subordinate box tool

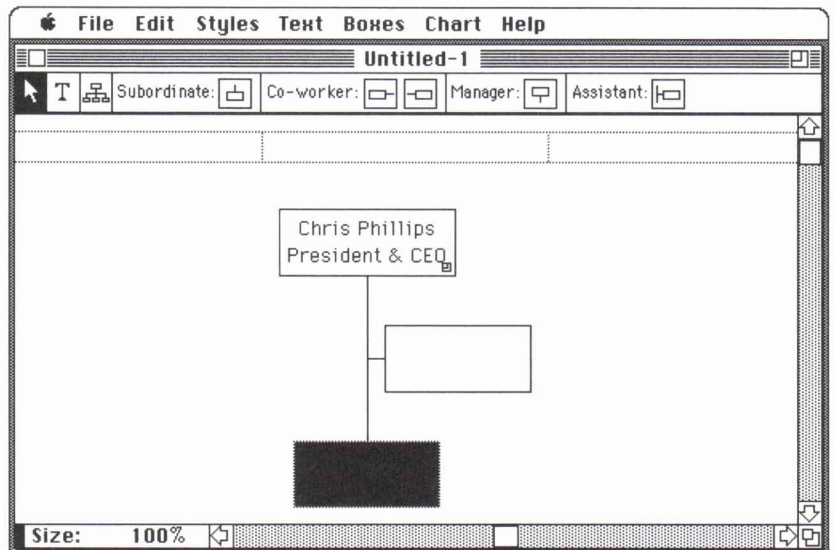


Figure 3-7. After creating the first subordinate

3. Click the second Co-worker box tool three (3) times, as shown Figure 3-8.

If you click too many times, click the Selection Arrow tool in the upper left corner of the window, then repeat step 3.

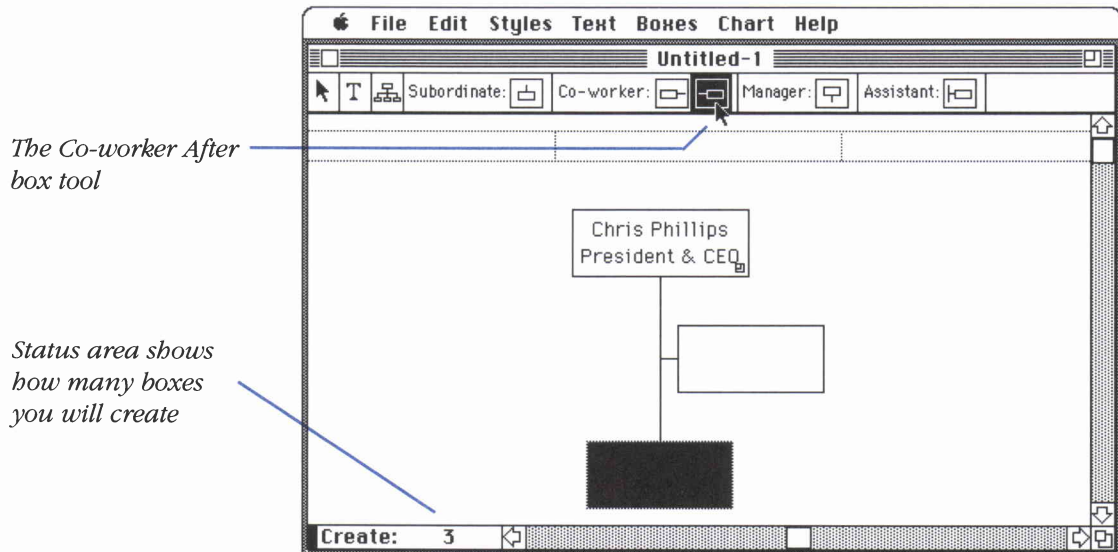


Figure 3-8. Clicking the Co-worker After box tool

There are two Co-worker box tools: the Co-worker Before box tool, and the Co-worker After box tool. The Co-worker Before box tool creates a co-worker box to the left or above an existing box in the chart. The Co-worker After box tool creates a co-worker box to the right or below an existing box in the chart.

4. Click the highlighted box.

Your chart should appear as shown in Figure 3-9. If it doesn't, choose Undo from the Edit menu and repeat steps 3 and 4.

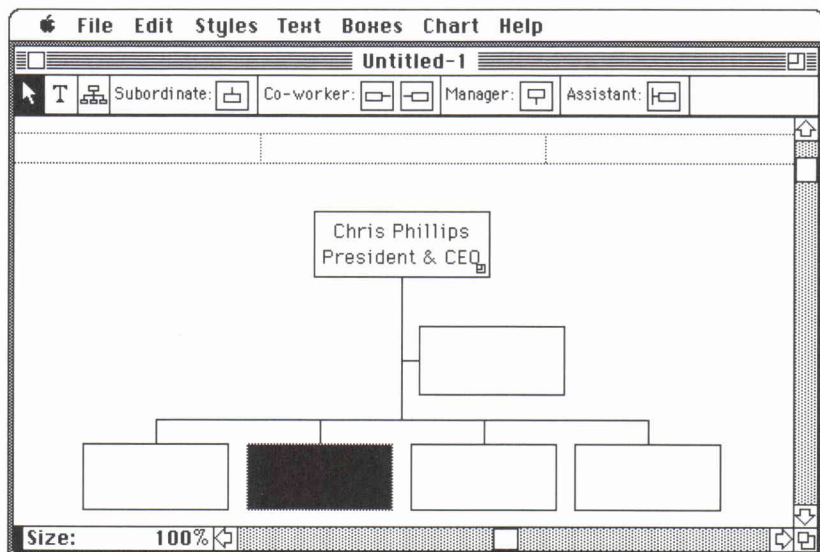


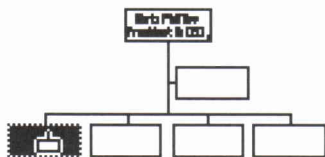
Figure 3-9. After creating the other three subordinate boxes

The highlight moves to the first of the newly created boxes.

Each of the four executive staffers also have subordinates. You'll create their boxes next.

5. Click the Subordinate box tool five (5) times.

If you click too many times, click the Selection Arrow tool in the upper left corner of the window, then repeat step 5.



6. Click the left-most subordinate's box, as shown in the figure to the left.

Your chart should appear as shown in Figure 3-10. If it doesn't, choose Undo from the Edit menu and repeat steps 5 and 6.

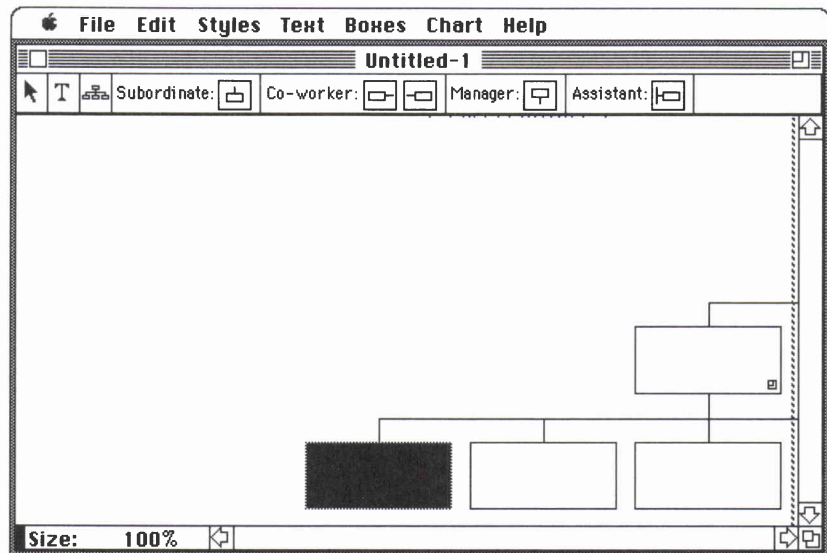


Figure 3-10. Chart no longer fits in window

The chart is now larger than the window. You can reduce the chart so that it fits in the window.

7. Choose Size to Window from the Chart menu.

This command makes your chart fit in the window, but doesn't change the actual size of the chart. When you print your chart, it will appear at full size.

Your chart should appear as shown in Figure 3-11. If you created fewer than 5 boxes, click the Subordinate box tool once for each additional box you need, then click the manager's box to add the additional subordinate boxes.

Notice that the new boxes — called a **group** — are arranged horizontally. You can arrange groups in 20 different ways, called **group styles**.

Charts get very wide if all the groups are arranged horizontally. In the example, the chart is a little too large to fit on one page. The page border line in Figure 3-11 shows that the chart spans two separate, side-by-side pages. The status area shows that you're seeing the chart at 30% of its actual size.

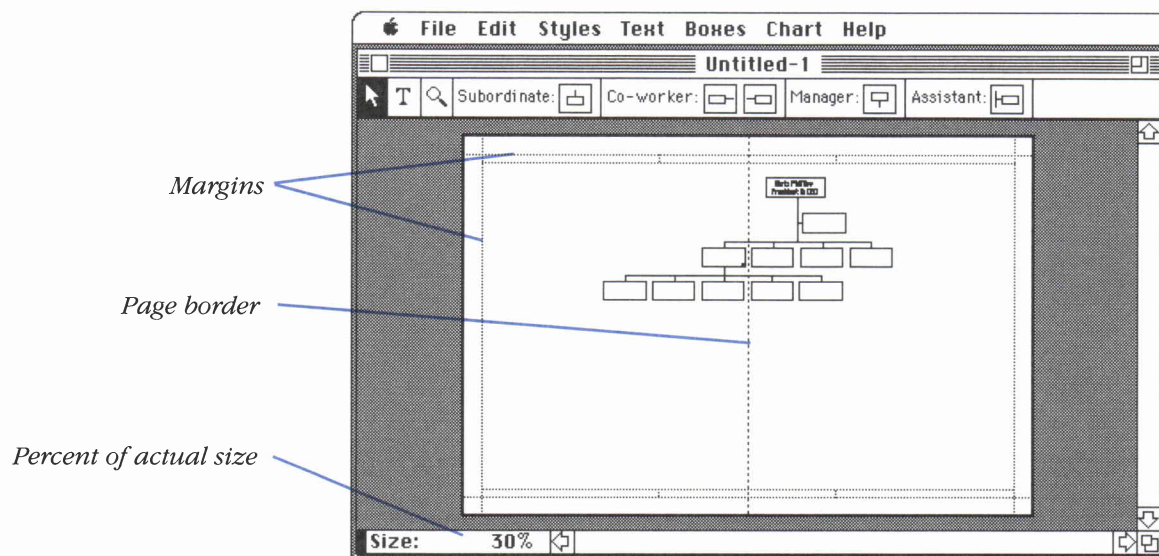


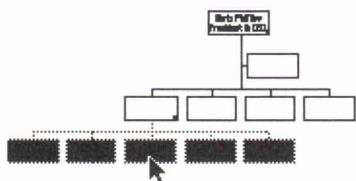
Figure 3-11. Viewing the entire chart

Changing group styles

In this section you'll learn how to change group styles. You'll also learn how to create a group with the style of your choice.

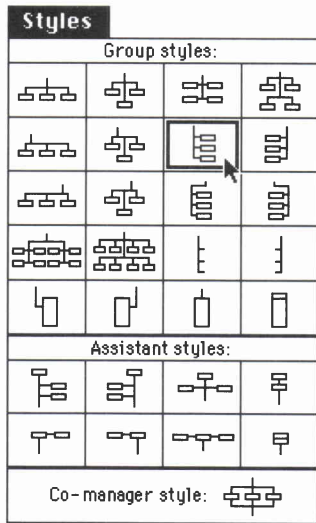
You'll start by changing the newly created group's style so that the boxes are arranged vertically instead of horizontally.

1. **Double-click any of the bottommost boxes, as shown in the figure to the left.**



This should highlight — that is, **select** — the entire group of five boxes. If it doesn't, click any box once and then press and hold the Command key while you type G, for "Group".

About double-clicking: Some people find double-clicking very tricky. If double-clicking doesn't work well for you, use the Command-G keystroke combination (described in the previous paragraph) to select groups of boxes.



2. **Choose a single column group style from the Styles menu, as shown in the figure to the left.**

The precise number of boxes in each little square of the Styles menu doesn't matter. They are shown only to illustrate the basic style.

Your chart should appear as shown in Figure 3-12. If it doesn't, choose Undo from the Edit menu and repeat steps 1 and 2.

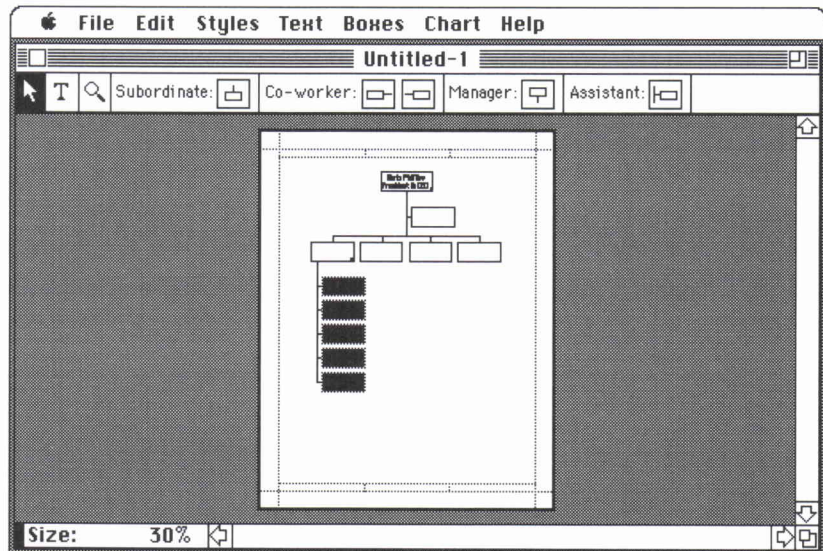


Figure 3-12. After changing the group style

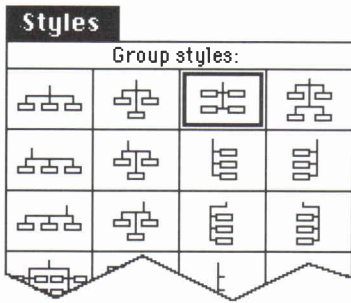
Your chart once again fits on a single page.

You never have to worry about adding or deleting pages: Org Plus automatically creates only as many pages as necessary to contain your chart.

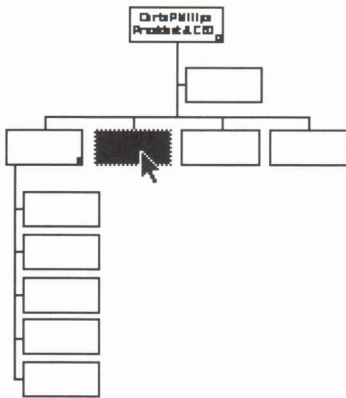
Now you'll create the next group, but you'll choose a group style *before* creating the boxes in the chart.

3. **Click the Subordinate box tool seven (7) times.**

If you click too many times, click the Selection Arrow tool in the top left corner of the window, then click the Subordinate box tool again.



4. Choose a two column group style, as shown in the figure to the left.



5. Click the box of the second subordinate to the President, as shown in the figure to the left.

Your chart should appear as shown in Figure 3-13. If it doesn't, choose Undo from the Edit menu and repeat steps 3 through 5.

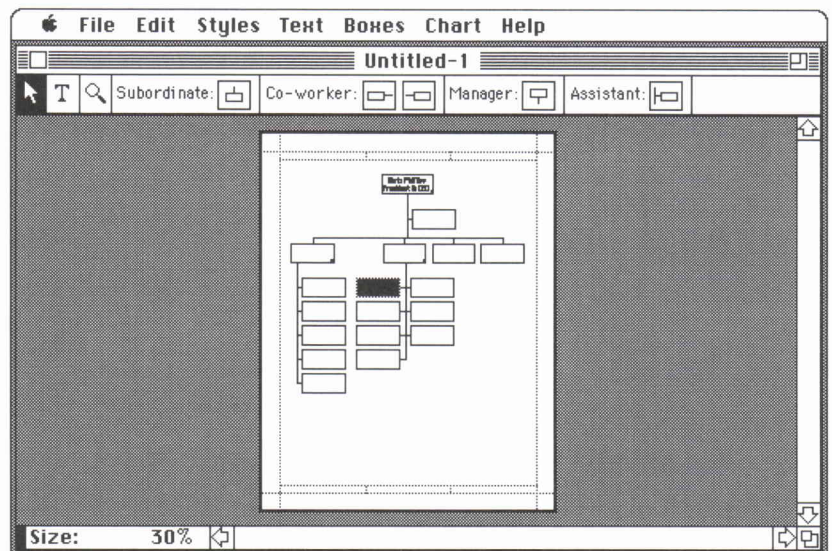
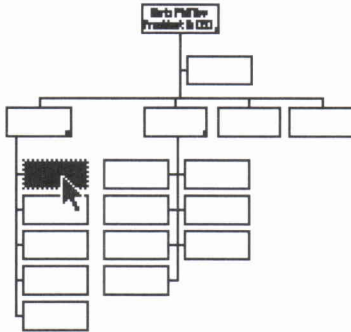


Figure 3-13. After creating another group in a different style

Deleting boxes

This section shows you how to delete unwanted boxes. In this example, you'll delete two boxes.

1. **Click the first subordinate box of the first executive staff box, as shown in the figure to the left.**



2. **Press and hold the Shift key while you click the second box, as shown in the second figure on the left.**

This selection technique is called **Shift-clicking**. You can Shift-click to select boxes scattered throughout your chart.

3. **Press the Delete key.**

The Delete key is located a couple rows above the Return key. On some keyboards it is called the Backspace key.

Your chart should appear as shown in Figure 3-14. If it doesn't, choose Undo from the Edit menu and repeat steps 1 through 3.

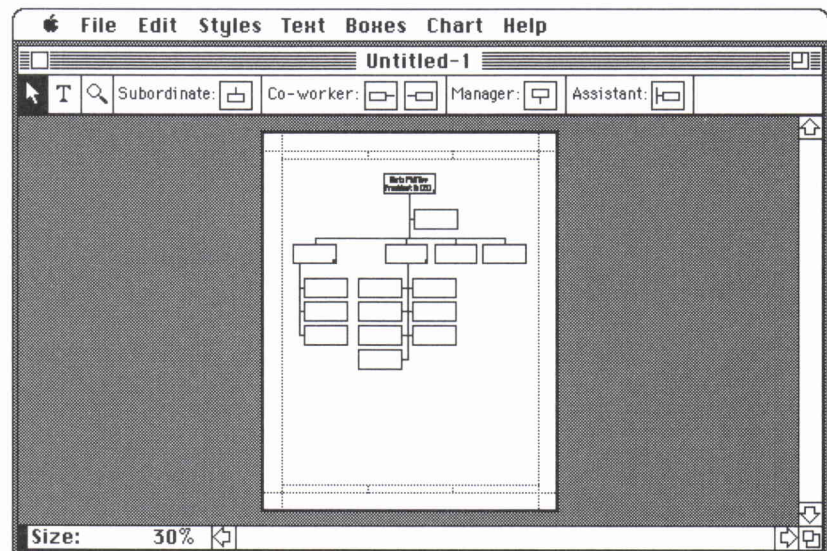
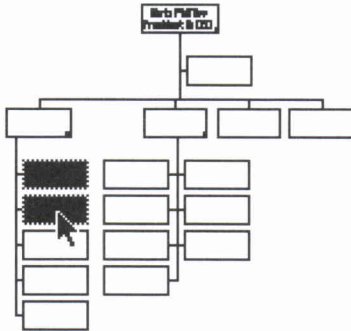


Figure 3-14. After deleting the two boxes

Notice that when the box is deleted, Org Plus redraws the group so that there isn't a gap left where the deleted boxes were located.

Finishing the chart

In this part of the tutorial, you've learned the commands and techniques necessary to create a basic chart design:

- *Create boxes* by clicking once or multiple times on a box tool, then clicking on the box in the chart to which you want to attach the new box or boxes.
- *Change group styles* by selecting the group, then choosing a group style from the Styles menu. To select a group, double-click any box in the group, or click any box in the group and press Command-G.
- *Delete boxes* by clicking on the box or boxes you want to delete, then pressing the Delete key.

1. **Use the skills you learned in this part of the tutorial to finish the chart, as shown in Figure 3-15.**

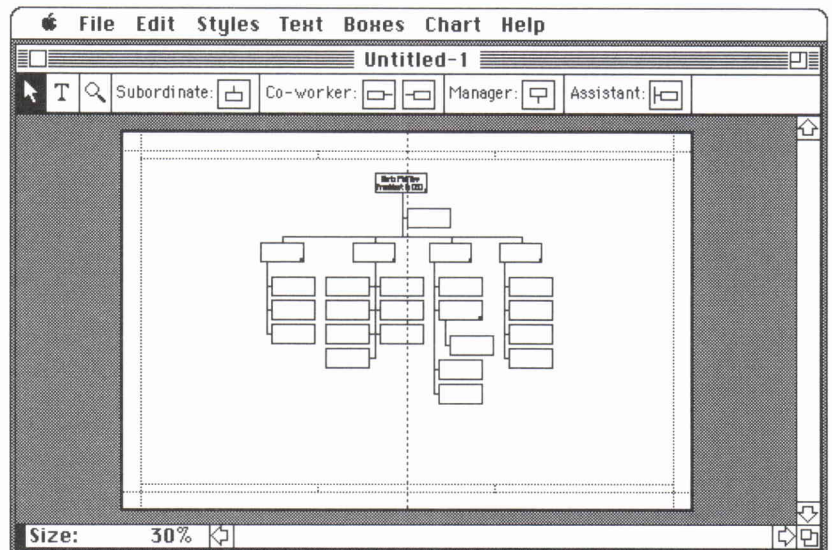


Figure 3-15. The finished chart

End of Part I

You've now completed the first part of this tutorial.

To get ready for Part II, do the following:

1. Choose Close from the File menu.

Org Plus asks you if you want to save your chart, as shown in Figure 3-16.

2. Click the No button, as shown in Figure 3-16.

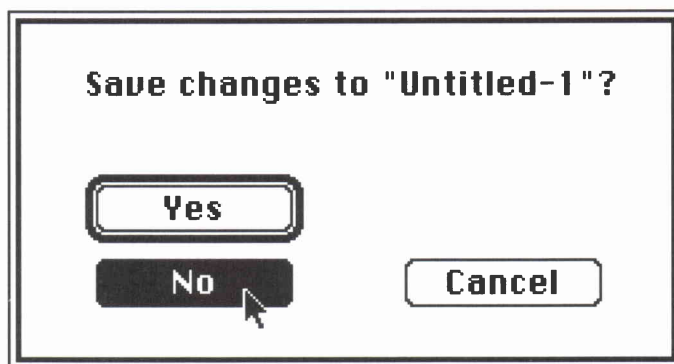


Figure 3-16. Close your chart without saving it

You don't need to save what you've done in order to do the next part.

If you want to quit now and do Part II later, you can choose Quit from the File menu. If not, keep reading.

Part II: Completing a chart

In this part of the tutorial you'll complete the chart for Allen Manufacturing (Figure 3-17). You'll learn:

- How to change box shadows
- How to show different information in different boxes
- How to draw dividing lines inside boxes
- How to change type styles
- How to enter information

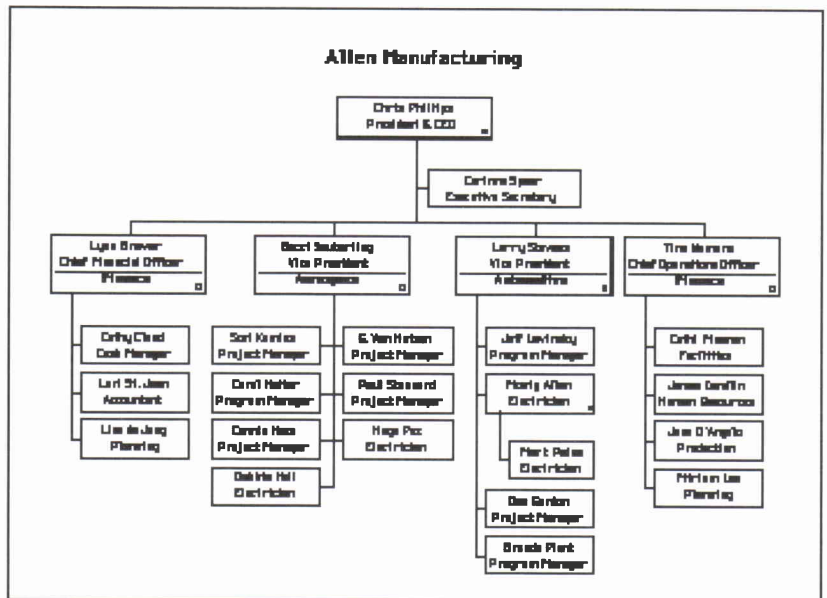


Figure 3-17. What you'll create in Part II

Getting started

If Org Plus isn't started, start it now. Click the Cancel button in the dialog box that appears, and continue with step 1 below.

You'll start with a chart in your Org Plus Tutorial folder.

1. Choose Open from the File menu.

The Open dialog box appears, as shown in Figure 3-18.

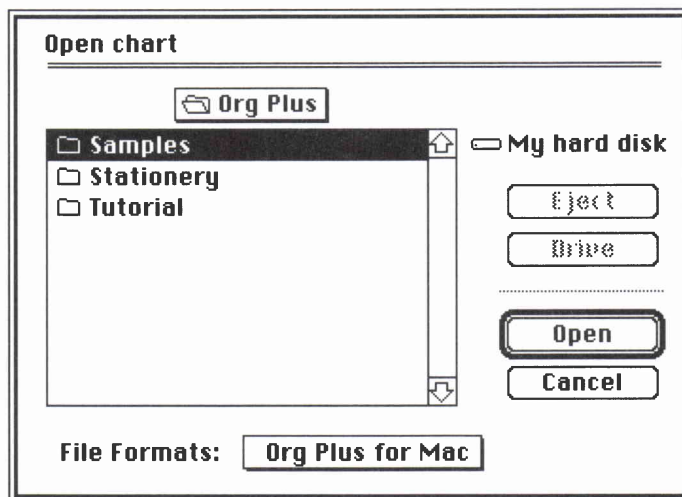


Figure 3-18. The Open dialog box

If you are working with a two floppy drive system: Eject the System disk and insert the *Org Plus Help & Learning* disk. (Your Macintosh will prompt you to put the System disk back in the disk drive at the appropriate time later in the tutorial.)

2. Double-click the Tutorial folder to open it.

The Open dialog box should now appear as shown in Figure 3-19.

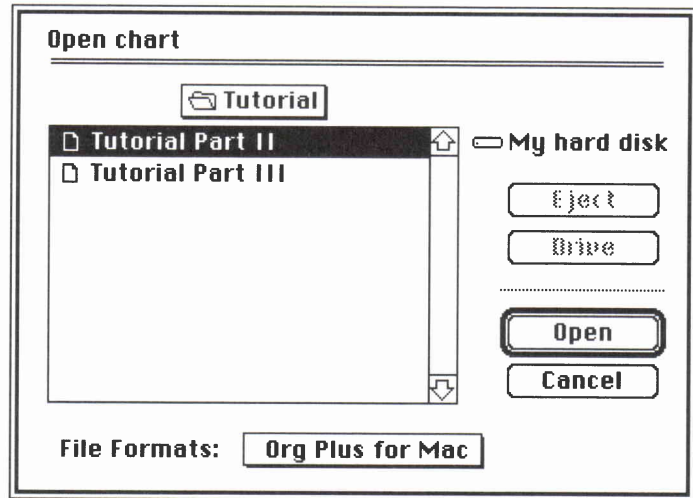


Figure 3-19. After opening the Tutorial folder

3. Click the Open button to open the chart “Tutorial-Part II”.

You’ll see a chart like the one you started in Part I, with the names and titles for all the individuals in the company filled in (Figure 3-20).

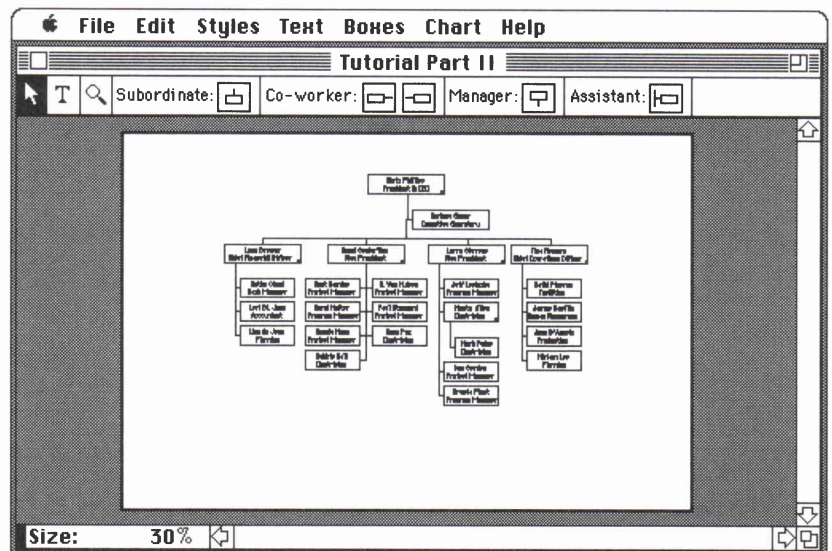
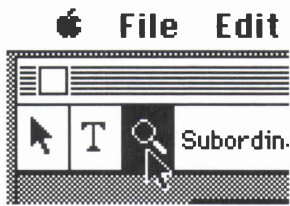


Figure 3-20. Allen Manufacturing with names and titles

Changing box styles



As it appears, the chart is very plain. To make it more interesting, start by emphasizing the boxes of the President and his executive staff:

1. **Click the Reduce/Enlarge tool in the upper left area of the window, as shown in the figure to the left.**

You use the Reduce/Enlarge tool to magnify the chart when it is shown reduced, or to reduce it when it is shown at actual size – the size it will appear when printed..

2. **Click the President's box to magnify it.**

The President's box should be clearly visible, as shown in Figure 3-22.

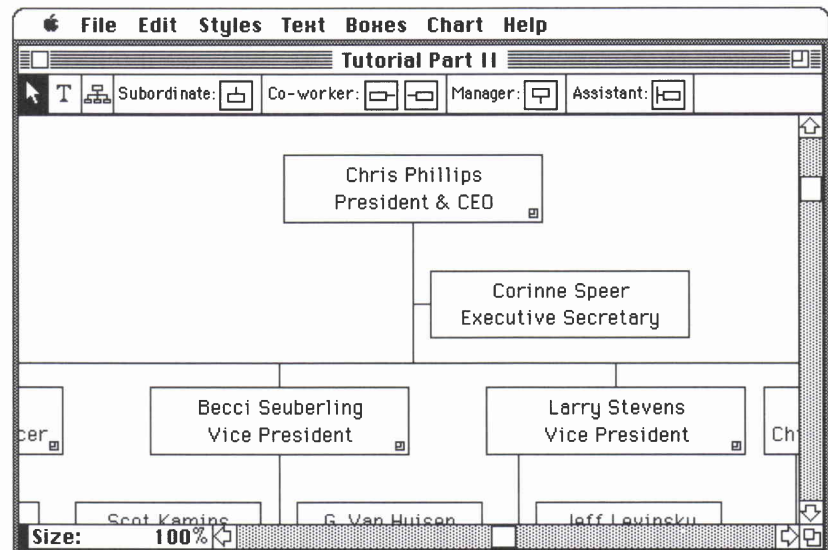


Figure 3-22. Magnifying the President's box

Now you'll apply a box shadow to the President and his executive staff.



3. **Click the President's box to select it.**

4. **While you hold the Shift key, double-click Becci Seuberling's box.**

If you have trouble double-clicking, then click Becci's box once and press Command-G. Either technique selects all the executive staff boxes.

Your chart should appear as shown in Figure 3-23.

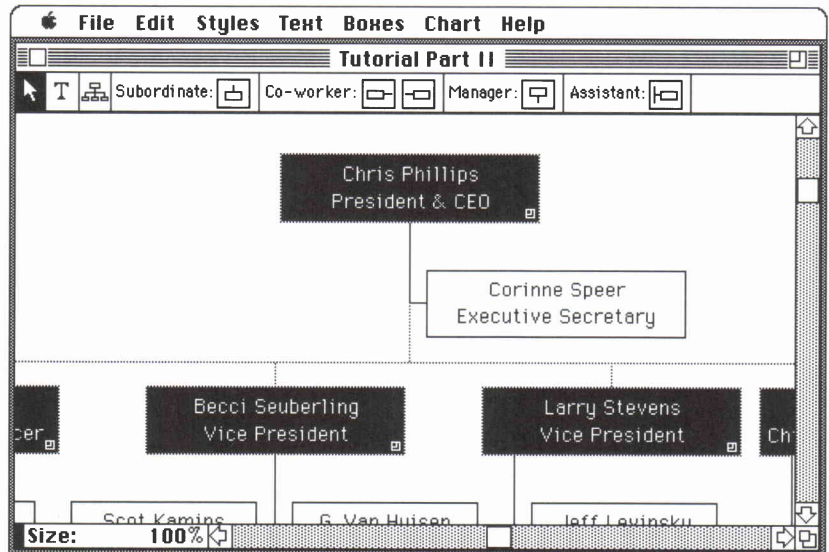
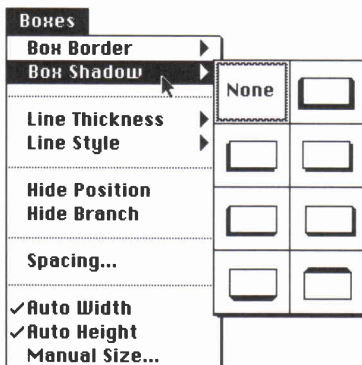


Figure 3-23. Selecting the President and his subordinates

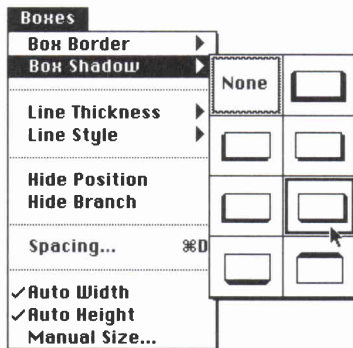


5. **Pull down the Boxes menu and highlight the Box Shadow command, as shown in the figure to the left.**

The Box Shadow submenu appears.

6. **While you continue to press the mouse button, drag the pointer to the right until it appears in the Box Shadow submenu.**

This is how you choose a command from a submenu.



7. **Drag the arrow over the third style down on the right, as shown in the figure to the left.**
8. **Release the mouse button.**

Making choices from submenus is tricky. You may need to practice this a few times.
9. **Click in the white area of the chart to better see the effect of your selection.**

Your chart should appear as shown in Figure 3-24. If it doesn't, repeat steps 3 through 8 above.

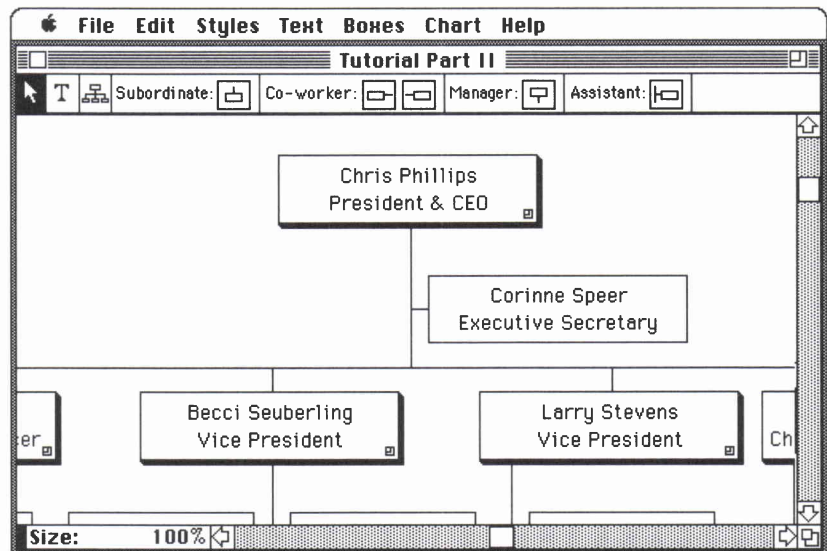


Figure 3-24. After adding box shadows

You can change the box shadow or border of any box in your chart (take a look at the Box Border submenu, located above the Box Shadow command). You can also change the thickness and style of connecting lines.

Box borders and shadows can give your chart a more professional appearance.

Changing the label setup for selected boxes

<Name>
<Title>

<Name>
<Title>
<Department>

The labels for the information you enter into the boxes in your chart, and the way they are arranged, is called the **label setup**. The label setup is like a blueprint for the information you want in each box.

The label setup for the Allen Manufacturing chart is shown to the left. Name appears above Title. You can have different label setups for different boxes in your chart.

In this section you'll add a label called "Department" to the label setup of the President's executive staff, as shown in the figure to the left. This will allow you to enter department names into their boxes in the chart. You'll also make the Department label bold and draw a line above it to give it emphasis.



A key concept: You can change the contents and appearance of the information in your chart by changing the label setup.

Adding a label to the setup

You can change the label setup at the Label Setup dialog box. You start by selecting the boxes whose setup you want to change.

1. Double-click Becci Seuberling's box.

Or, click Becci's box once, and then press Command-G.

Either technique selects all the executive staff boxes.

2. Choose Label Setup from the Edit menu.

Org Plus displays the label setup for the selected boxes, as shown in Figure 3-25.

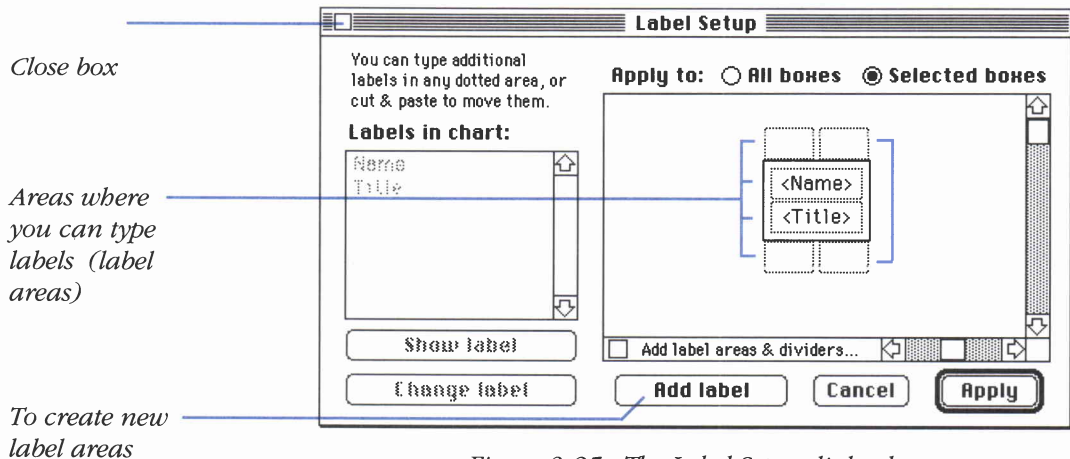


Figure 3-25. The Label Setup dialog box

The dotted rectangular areas are called **label areas**. The blinking insertion point is in the Name label area.

Don't worry about all the other things you see in this dialog box.

3. Press Tab.

This moves the blinking insertion point to the Title label area.

4. Click the Add Label button, located in the bottom center of the dialog box.

When you click this button, Org Plus creates a label area in which you can type the new label (see figure to the left).



5. Type Department.

Don't type angle brackets. Org Plus adds those automatically later.

Next you'll add a dividing line above the department.

6. Position the pointer over the check box labelled "Add label areas and dividers" (see Figure 3-25).

7. **Click the check box.**

This is how you *select* a check box item.

Org Plus displays additional buttons in the scroll bars (see Figure 3-26). You'll use a button in the vertical scroll bar to create a dividing line.

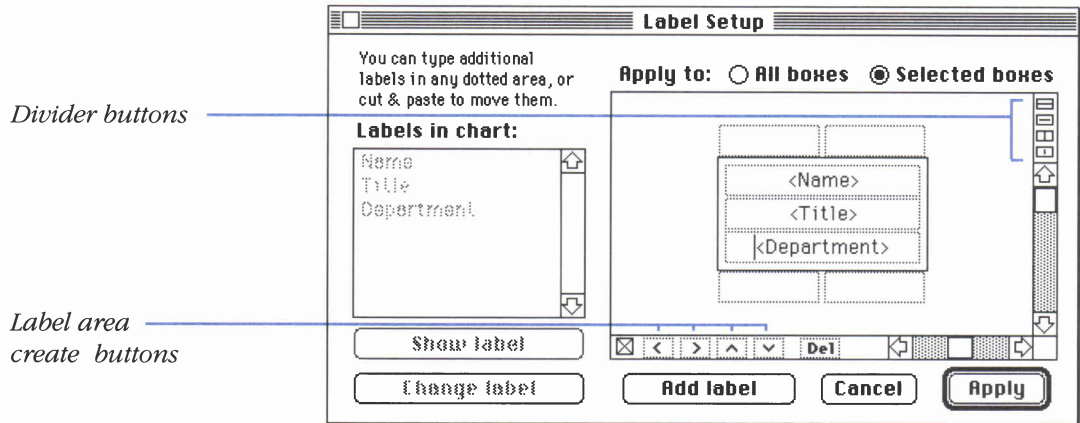


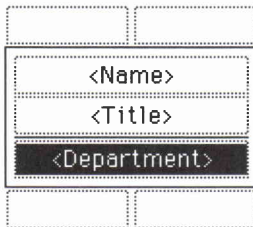
Figure 3-26. After displaying label area and divider buttons



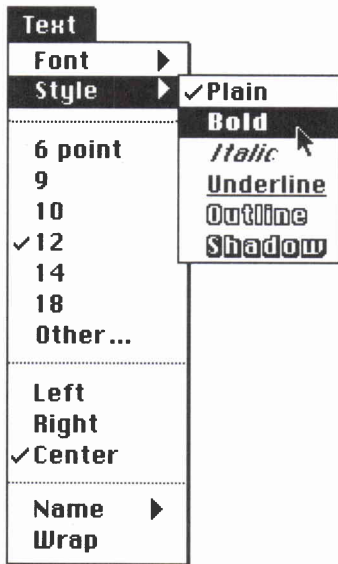
8. **Click the second divider icon, as shown in the figure to the left.**

Look carefully. Org Plus has created a dividing line *above* the Department label.

Now give Department a bold font style.



9. **Click the Department label.**



10. Pull down the Text menu, and choose Bold from the Style submenu, as shown in the figure to the left.

Choose this command the same way you chose a box shadow: pull down the Text menu, position the arrow over the Style command, and drag from the left into the submenu on the right.

11. Click the Apply button to apply the new setup to the executives' boxes.
12. Click the close box in the upper left corner of the Label Setup dialog box (see Figure 3-25 on page 44).

Your chart should appear as shown in Figure 3-27. If it doesn't, choose Undo from the Edit menu and repeat steps 2 through 12.

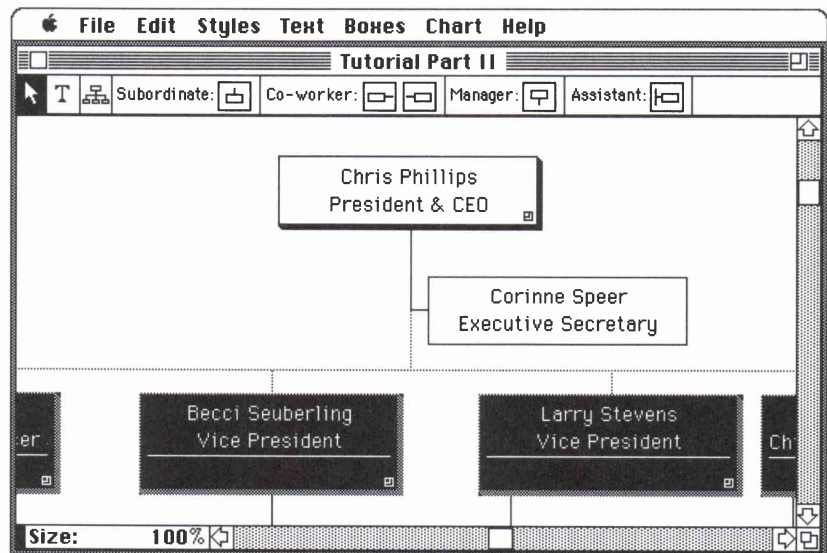


Figure 3-27. What your chart should look like

Notice that there is now room for you to type in department names.

Entering information

This section shows you how to enter the department names.

1. **Click below the words *Vice President* in Becci Seuberling's box.**

You'll see the Department label you just created.

2. **Type *Aerospace*.**



Becci's box should appear as shown in the figure to the left.

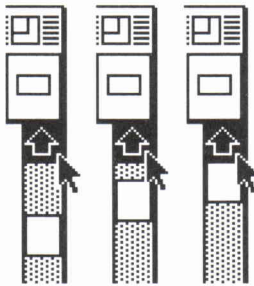
Notice that "Aerospace" appears bold. That's because you made the Department label bold in the Label Setup dialog box.

You could enter department names for the other executives. Click a box to select it, then click a second time to enter information. However, there's no need to do that now.

Annotating the chart

You're almost finished. All you have to do is give the chart a title.

First, you need to move to the top center of the chart.



1. **Click the up arrow in the top right corner of the window until the scroll box moves to the top of the scroll bar, as shown in the figure to the left.**

Next, you'll make the top title area visible.

2. **Choose Show Page Lines from the Chart menu.**

Your chart should appear as shown in Figure 3-28.

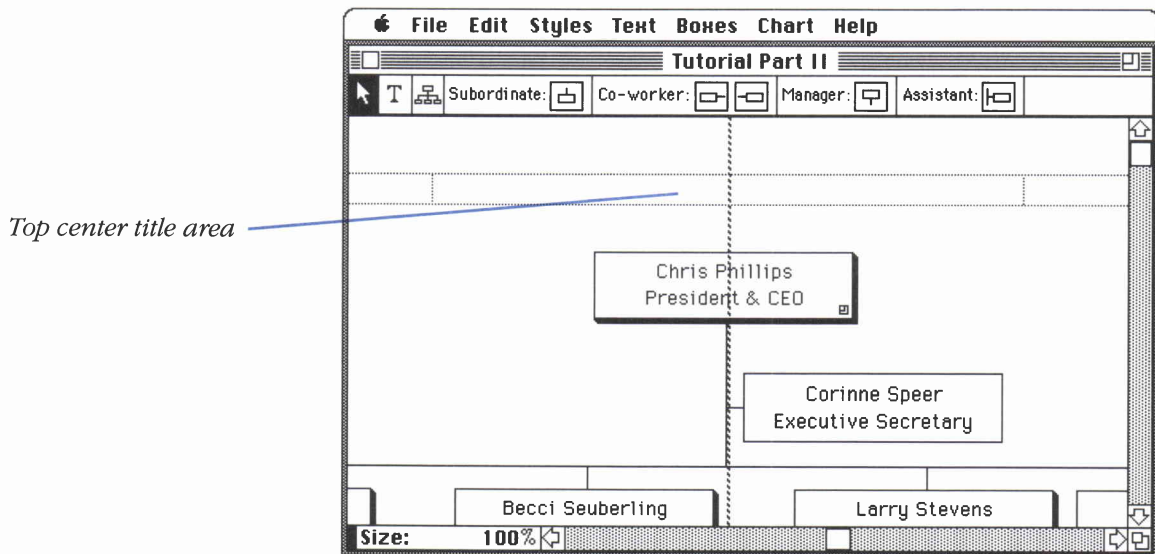


Figure 3-28. Showing page lines

3. Click in the title area at the top of the window (see Figure 3-28).
4. Choose **Bold** from the Style submenu, located in the Text menu.
5. Choose **18** from the Text menu.
6. Type **Allen Manufacturing**.
7. Choose **Hide Page Lines** from the Chart menu.

Your chart should appear as shown in Figure 3-29. If not, choose **Undo** from the Edit menu and repeat steps 3 through 7.

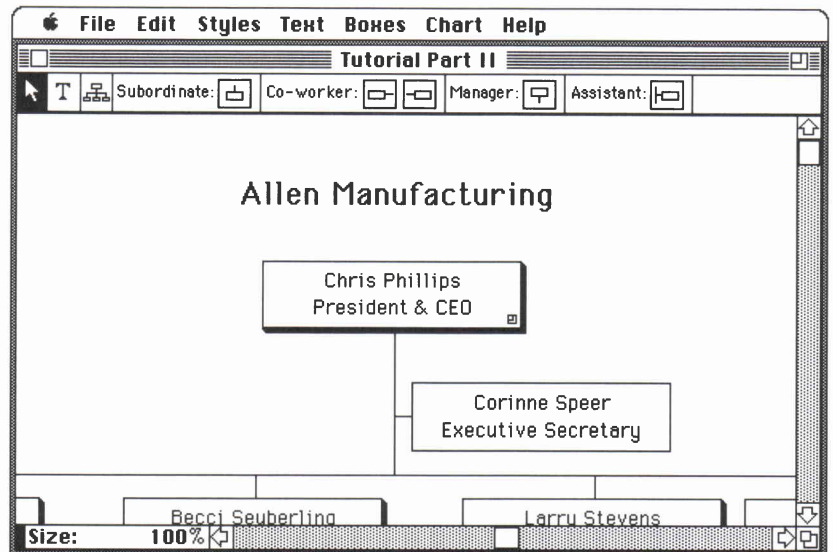


Figure 3-29. Creating a title

Org Plus automatically centers the title above your chart.

If you wanted, you could type additional information in other title areas, as well as on the background of the chart. See "Annotating your chart," page 161, for more information when you have finished the tutorial.

End of Part II

In this part of the tutorial, you've learned several commands and techniques for changing the appearance of text and boxes in your chart:

- *Change box shadows* by selecting the boxes you want to change, then choosing a shadow from the Box Shadow sub-menu. You can also change box borders, line thickness, and line styles by making choices from the appropriate menus in the Boxes menu.
- *Change the label setup* by selecting the boxes whose setup you want to change, then choosing Label Setup from the Edit menu.

At the Label Setup dialog box, you can create new labels, rearrange them, change their appearance, create dividing lines, and much more. Whatever you do to the labels in the Label Setup dialog box, Org Plus does to the information in the boxes of your chart.

- *Title your chart* by showing the chart's page lines and entering the titles into the title areas.

To get ready for Part III, do the following:

1. **Choose Close from the File menu.**

Org Plus asks you if you want to save the chart.

2. **Click the No button.**

You don't need to save what you've done so far in order to do the next part.

If you want to quit now and do Part III later, you can choose Quit from the File menu. If not, keep reading.

Part III: Updating a chart

In this part of the tutorial you'll update the chart to reflect changes in Allen Manufacturing's organization. You'll learn:

- How to move boxes by dragging
- How to move boxes by cutting and pasting
- How to create special groupings called subgroups
- How to make the chart fit on one page

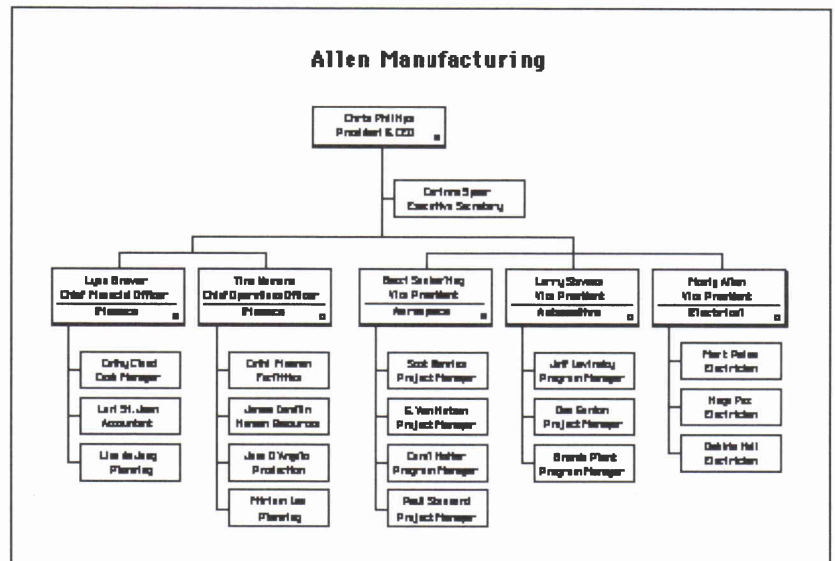


Figure 3-30. What you'll create in Part III

Getting started

If Org Plus isn't started, start it now. Click the Cancel button in the dialog box that appears, and continue with step 1 below.

You'll start with a chart in your Org Plus Tutorial folder.

1. Choose Open from the File menu.

If you have just started the application, the Open dialog box appears as shown in Figure 3-31.

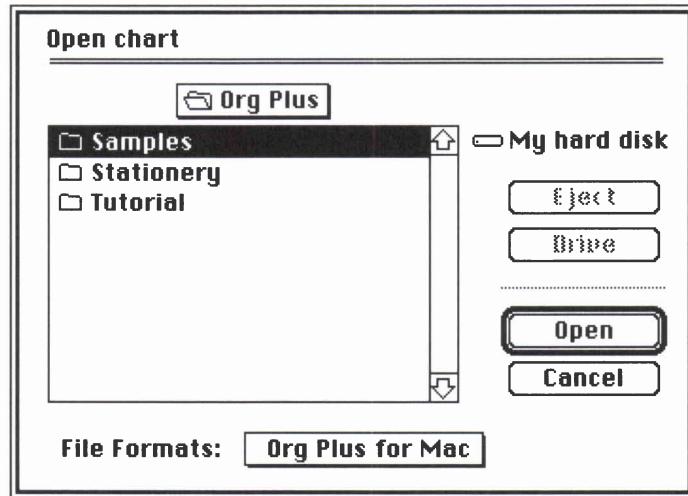


Figure 3-31. *If you just started the application*

Double-click the Tutorial folder to open it.

If you are continuing directly from Part II, the Open dialog box should now appear as shown in Figure 3-32.

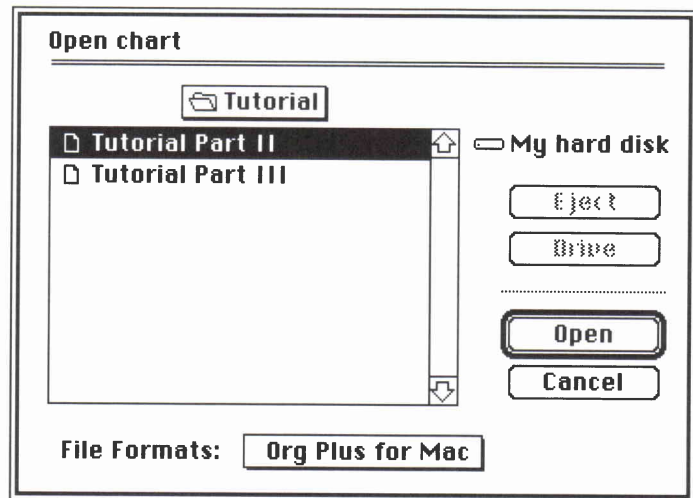


Figure 3-32. If you are continuing from Part II

If you are working with a two floppy drive system: Eject the System disk and insert the *Org Plus Help & Learning* disk, then double-click the Tutorial folder to open it.

2. Open the chart "Tutorial - Part III".

You see a chart like the one that you created in Part II (Figure 3-33).

Moving boxes

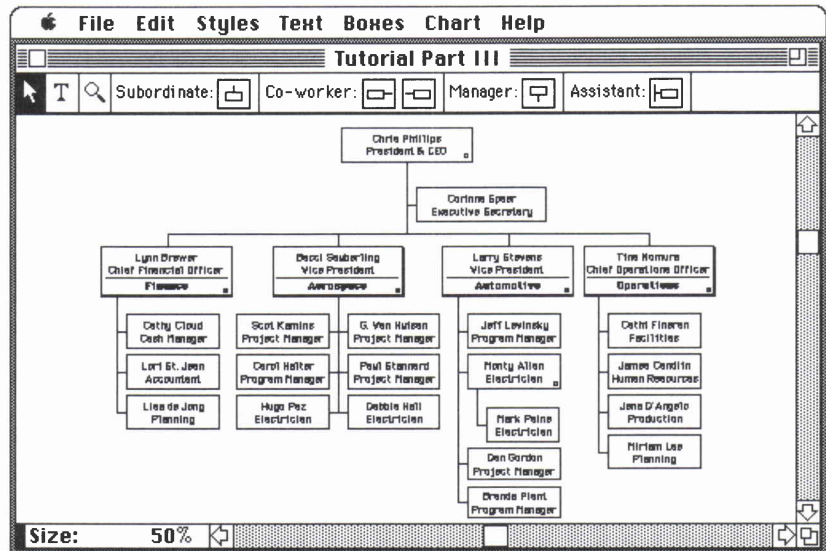


Figure 3-33. Allen Manufacturing

In this section, you'll make several changes to the Allen Manufacturing chart:

- Move one of the subordinates up to the level of the executive staff.
- Move other boxes to become subordinates of Monty.
- Change the left-to-right order of the executives.

First you'll create a new division, Electrical, with Monty Allen as its head.

1. **Position the arrow pointer over Monty Allen's box.**

Monty's box is shown highlighted in Figure 3-34.

2. **Press and hold the mouse button while you drag Monty's box over the right half of Tina Nomura's box. Don't release the button until you see a right pointing arrow, as shown in Figure 3-34.**

Right pointing
arrow

Tina's box

Monty's box

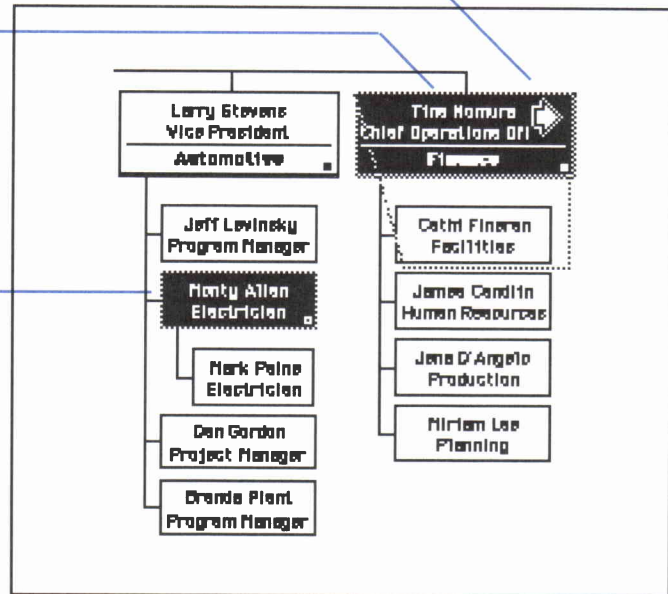


Figure 3-34. Dragging Monty's box over Tina's box

The right arrow signifies that Monty's box will be placed to the *right of* Tina's.

Monty and his subordinate should now appear next to Tina and her subordinates, as shown in Figure 3-35. If not, choose Undo from the Edit menu and repeat steps 1 and 2.

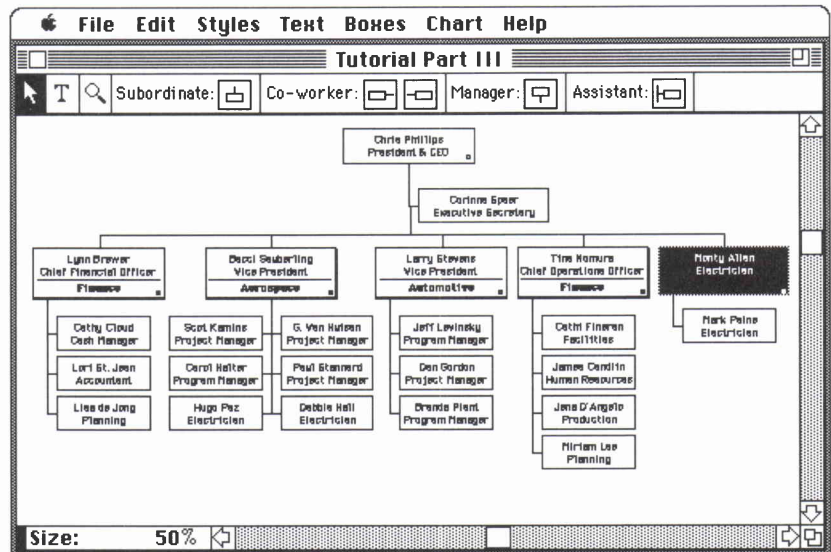


Figure 3-35. After moving Monty

Now you need to move two other employees into Monty's organization: Debbie Hall and Hugo Paz. Both currently report to Becci Seuberling.

You could move them one at a time, as you moved Monty. But you can move them both at the same time by cutting and pasting.

3. **Click Hugo's box (see Figure 3-36).**
4. **Press and hold the Shift key while you click Debbie's box, immediately to Hugo's right.**

Their boxes are now both highlighted, as shown in Figure 3-36.

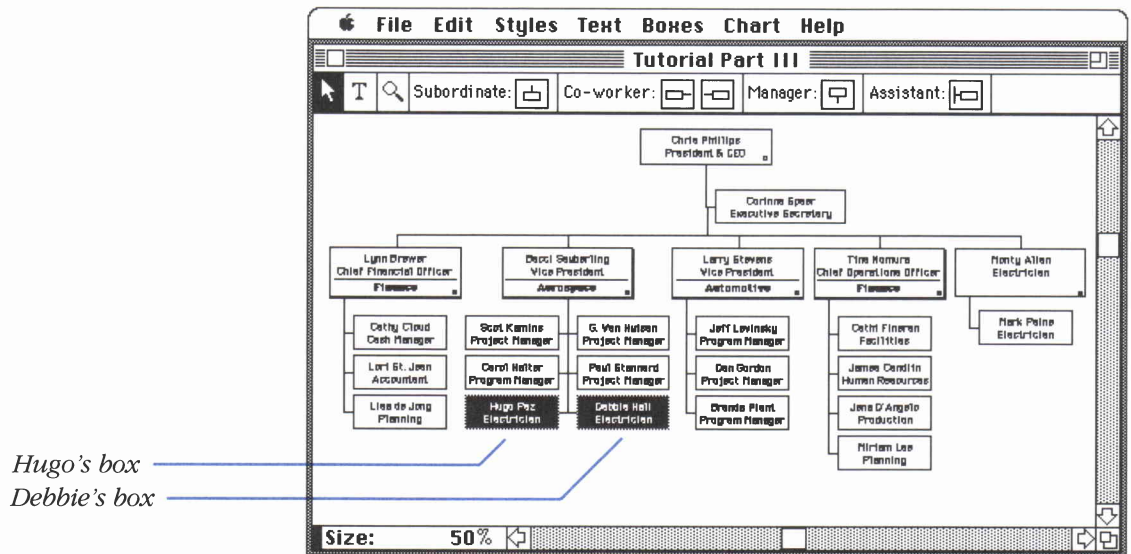


Figure 3-36. Hugo and Debbie's boxes selected

5. Choose Cut from the Edit menu.

Org Plus puts Hugo and Debbie's boxes on the Clipboard. (The Clipboard is a temporary storage place in your Macintosh.)

6. Click Monty's box.

7. Choose Paste from the Edit menu.

Boxes on the Clipboard are pasted as subordinates to the selected box — Monty's box, in this case.

Figure 3-37 shows what your chart should look like. If not, you may need to start Part III over again. Take care to follow the instructions exactly as written here. To start over again, choose Close from the File menu. Click No when Org Plus asks if you want to save the chart, then start with step 1 on page 52.

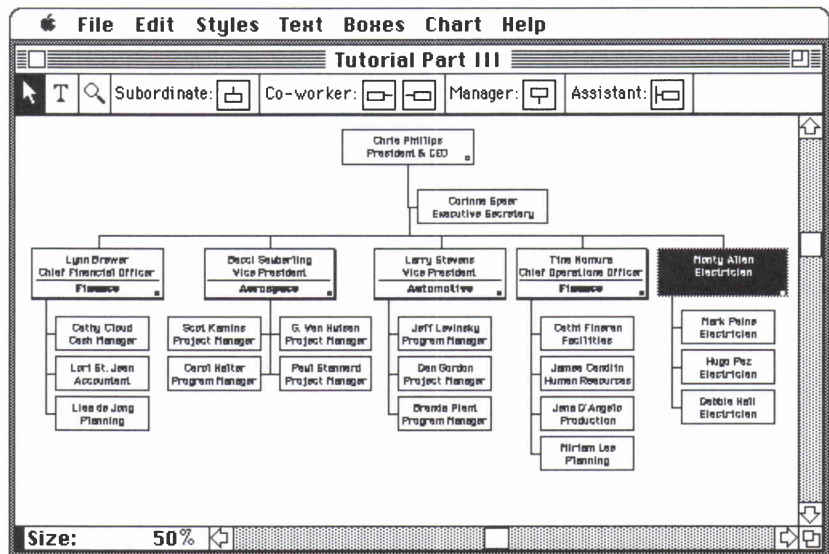


Figure 3-37. After pasting Hugo and Debbie

Changing the label setup

Monty still has his old label setup — Name above Title. In this section you'll use a special copy command to give him the same label setup as the other executives.

1. **Click Tina Nomura's box, shown highlighted in Figure 3-38.**
2. **Choose Copy Setup from the Edit menu, as shown in Figure 3-38.**

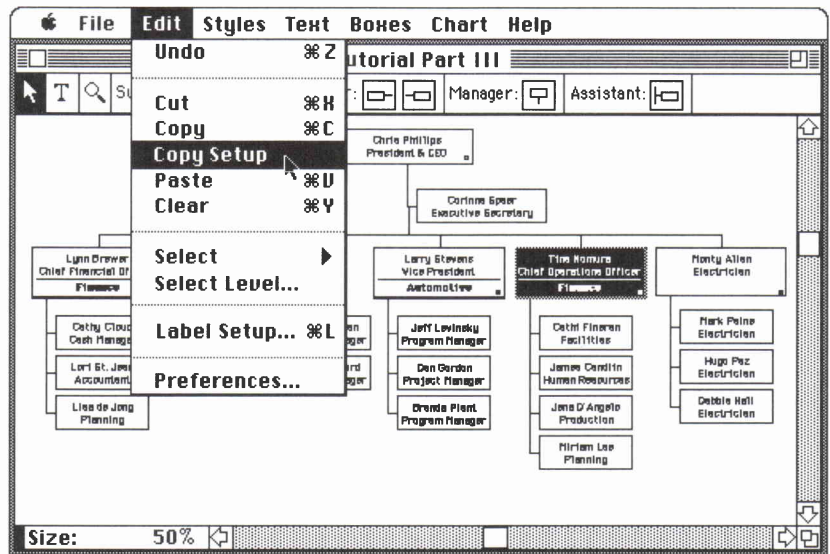


Figure 3-38. Copying the label setup from Tina's box

Tina's label setup — the way her information is arranged, including the dividing line — is placed on the Clipboard.

3. **Click Monty's box.**
4. **Choose Paste Setup from the Edit menu.**

Tina's label setup is pasted onto Monty's box, giving him the same setup.

Entering information

To enter Monty's new title and department name, follow the steps in this section. This section doesn't teach anything new, however. If you'd like to skip ahead, continue with "Creating subgroups" on page 61.

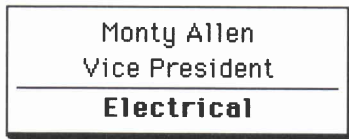
Monty's box is really too small to see all his information, so you'll make it larger:



1. **Click the Reduce/Enlarge tool in the upper left corner of the window, as shown in the figure to the left.**
2. **Click Monty's box.**

You'll see Monty's box the size it will appear when printed.

3. Press Return to edit the information in the box.
4. Press Tab to highlight his title.
5. Type Vice President.
6. Press Tab to highlight his department.
7. Type Electrical.



Monty's box should appear as shown in the figure to the left.

8. Choose 50% of Actual from the Chart menu.
9. Click the left arrow in the horizontal scroll bar, as shown in the figure to the left, three (3) times.



Your chart should appear as shown in Figure 3-39.

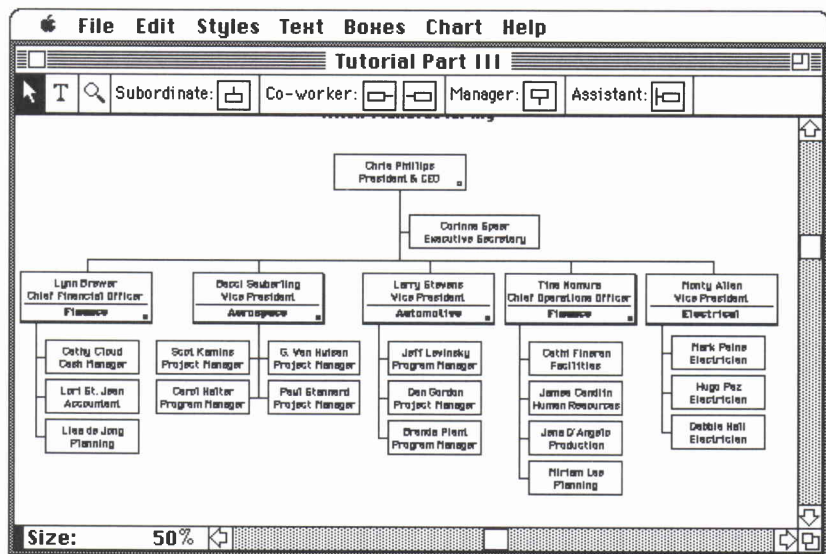


Figure 3-39. After updating Monty's information

Creating subgroups

The President of Allen Manufacturing likes to distinguish between the chief officers and the vice presidents. There are now two chief officers and three vice presidents.

In this section you'll move the chief officers next to each other and give them a separate group style.

1. **Drag Tina's box over the left half of Becci's box. Don't release the mouse button until Becci's box is highlighted and a left pointing arrow appears, as shown in Figure 3-40.**

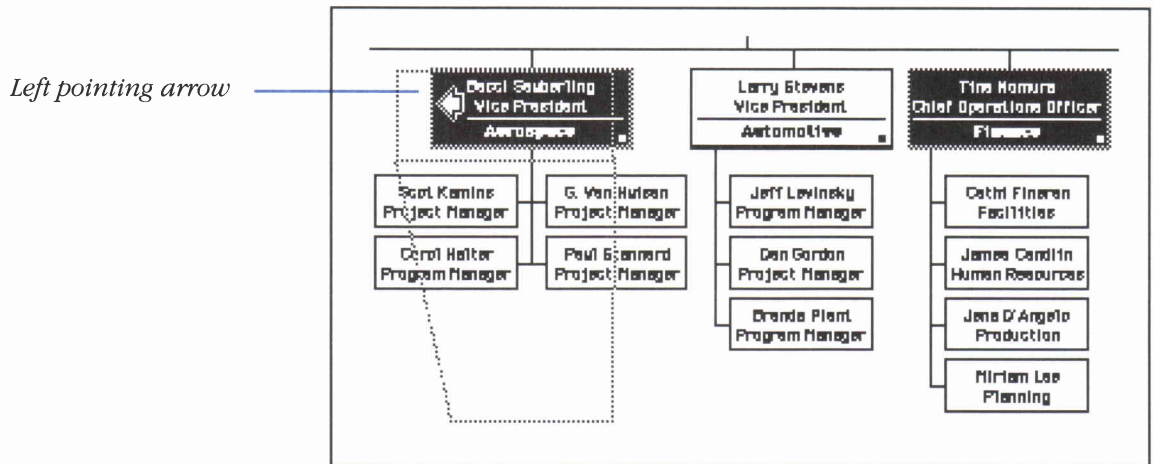


Figure 3-40. Dragging Tina's box over Becci's box

Tina's box should be to the left of Becci's, as shown in Figure 3-41. If not, choose Undo from the Edit menu and repeat step 1.

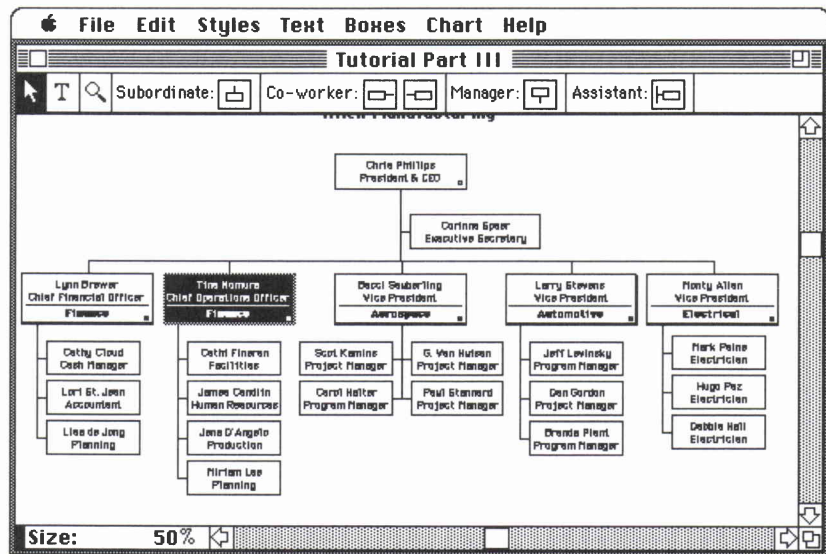
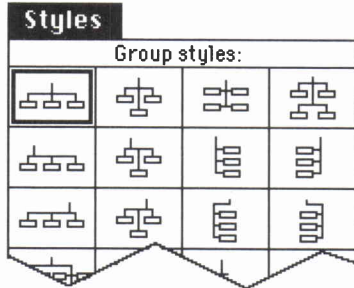


Figure 3-41. After dragging Tina's box

2. Press and hold the Shift key while you click Lynn's box, immediately to Tina's left.
3. Choose the first horizontal group style in the Styles menu, as shown in the figure to the left.



Lynn and Tina's boxes should be drawn as shown in Figure 3-42. If not, choose Undo from the Edit menu and repeat steps 2 and 3.

Subgroupings

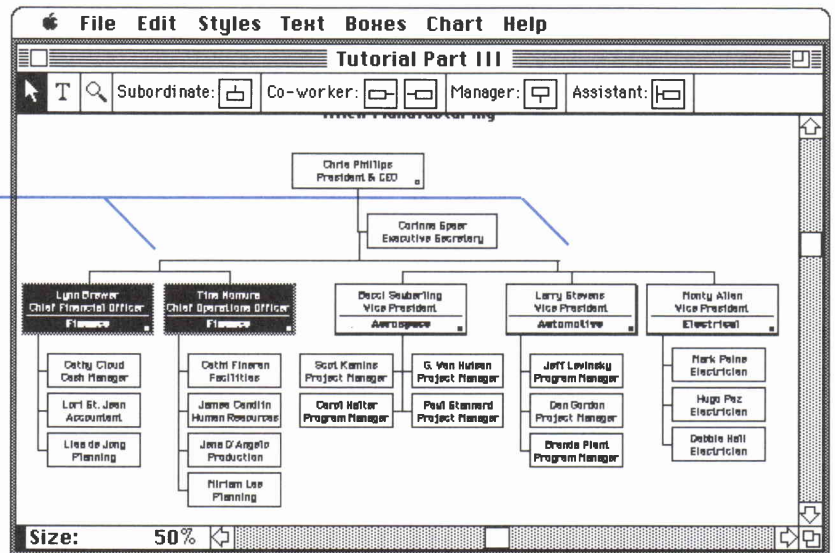


Figure 3-42. Showing subgroups

The chief officers are put in a special group — called a **subgroup** — by themselves. Notice that the vice presidents are now in their own subgroup also. A subgroup is a natural division of boxes within a larger group, as in the example.

Making it fit on one page

In this section you'll learn some techniques for making your chart fit on a single page.

1. Choose Size to Window from the Chart menu.

You can see the entire chart page area at a glance.

2. Choose Show Page Lines from the Chart menu.

Your chart should appear as shown in Figure 3-43.

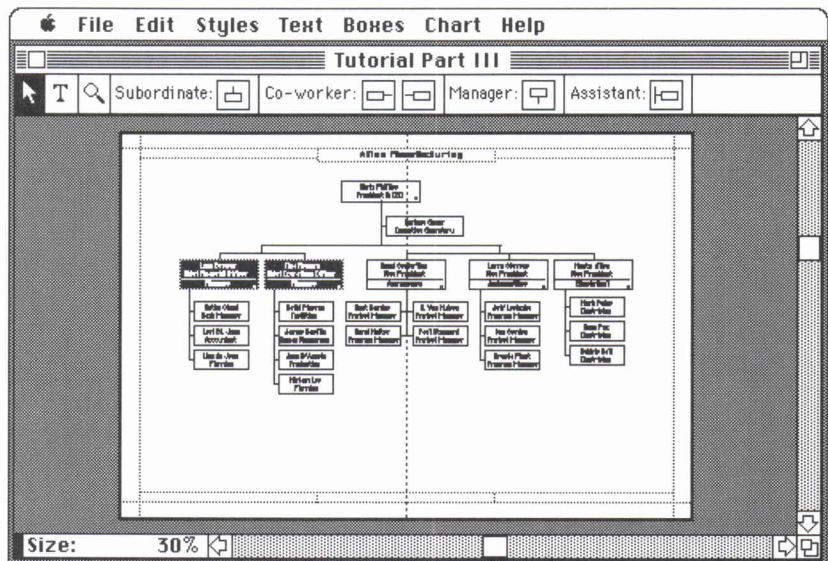


Figure 3-43. A two page chart

As you can see, it's going to be a challenge to get this chart to fit on one page. Since it is too wide, you'll have to make it narrower.

Changing group styles

Changing the way boxes are arranged can have a significant effect on the size of your chart.

1. **Double-click one of the boxes immediately below Becci's box, in the middle of the chart (see Figure 3-44).**

If you have trouble double-clicking, click one of the boxes and press Command-G.

Your chart should appear as shown in Figure 3-44.

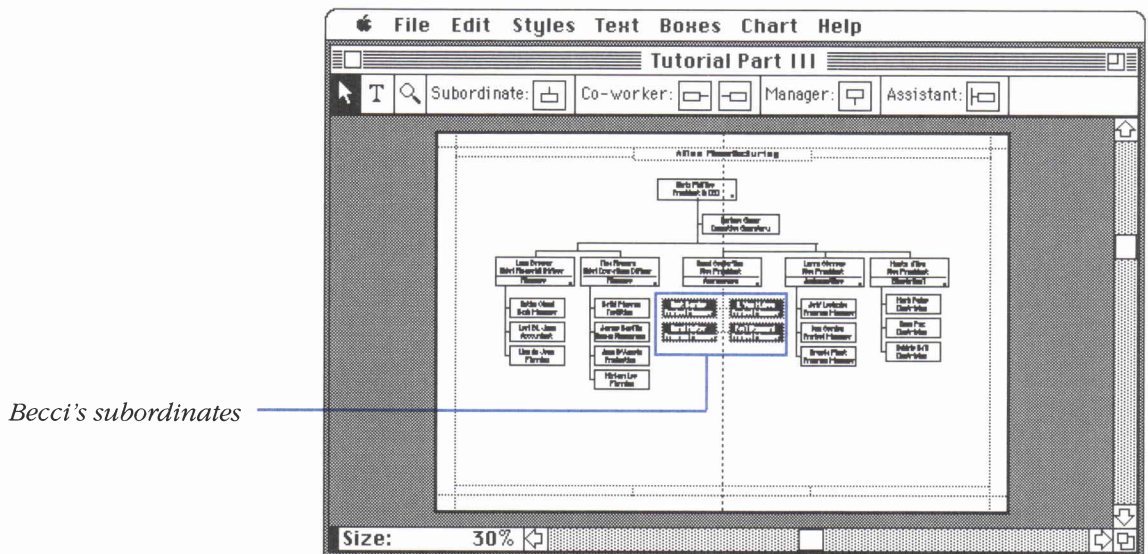
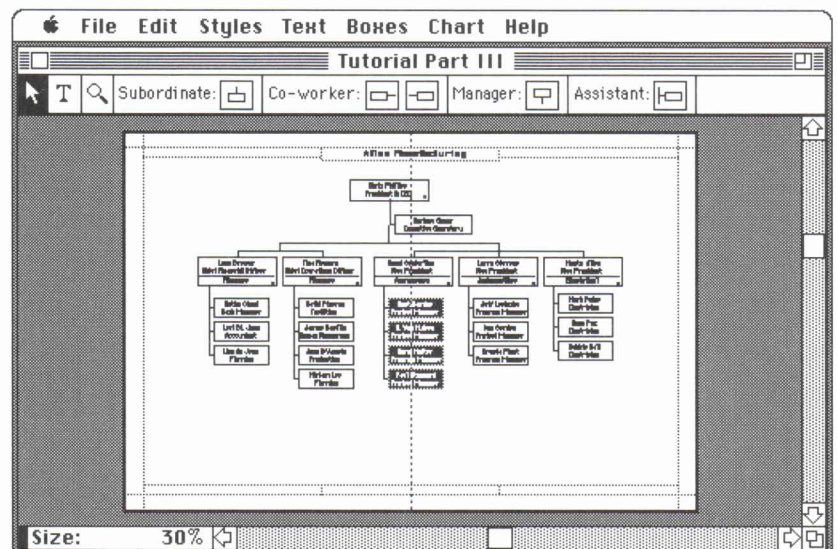
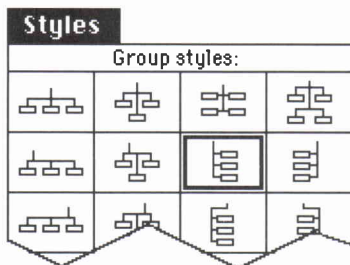


Figure 3-44. Selecting Becci's subordinates

2. Choose the single column group style shown in the figure to the left.

Your chart should appear as shown in Figure 3-45. If it doesn't, choose Undo from the Edit menu and repeat steps 1 and 2. This makes the chart narrower, but you'll have to do more.



Changing the page orientation

Since the chart is basically wider than it is tall, another thing you can do is change the page orientation.

1. Choose Page Setup from the File menu.

The Page Setup dialog box appears (Figure 3-46). The dialog box you see on your screen may vary in some respects from the one shown in Figure 3-46, depending on your printer.

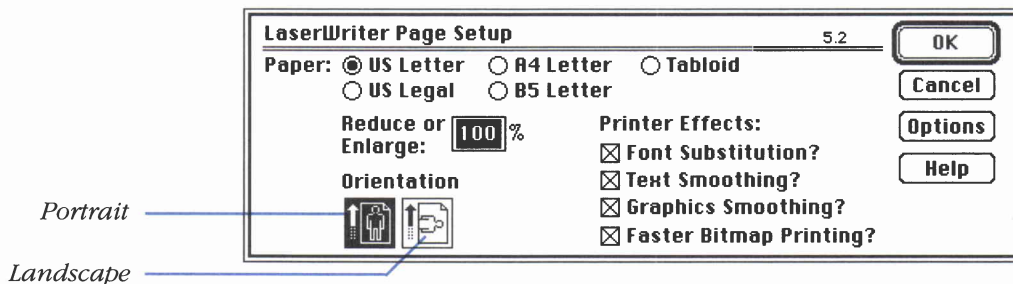


Figure 3-46. The Page Setup dialog box

2. Click the second (landscape) orientation icon.

3. Click the OK button.

Your chart should look like Figure 3-47.

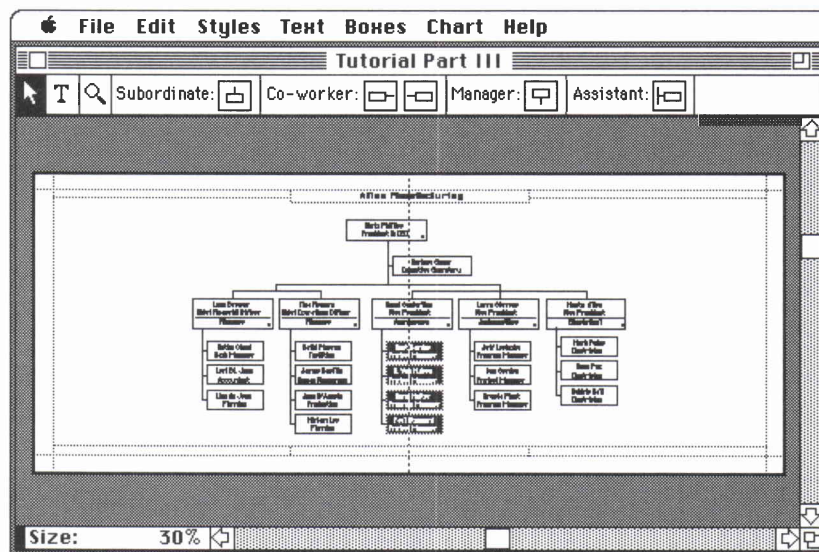


Figure 3-47. After choosing landscape orientation.

Using the Make Fit command

As you can see, it can take a while to get a chart to fit. That's why Org Plus has a special Make Fit command.

1. **Choose Make Fit from the Chart menu.**

The Make Fit dialog box appears (Figure 3-48).

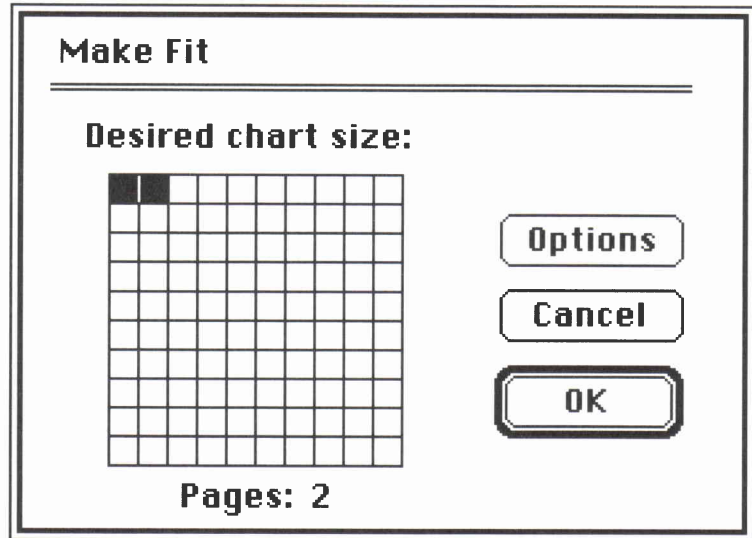


Figure 3-48. The Make Fit dialog box

You use this dialog box to select the desired number of pages for your chart. The two black squares indicates the chart currently fits on two pages.

2. **Click the top left square.**

This sets the desired chart size to one page.

3. **Click the Options button.**

The Make Fit Options dialog box appears, as shown in Figure 3-49.

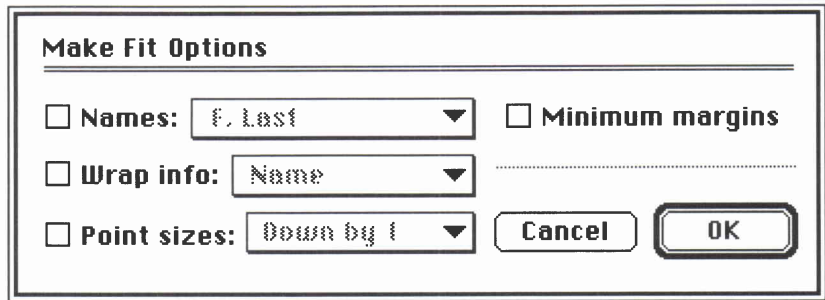


Figure 3-49. The Make Fit Options dialog box

Use this dialog box to select options that make your chart smaller.

☒ Minimum margins

4. Click the check box labelled “Minimum margins,” as shown in the figure to the left.

This tells Org Plus to use the minimum margins allowable on your printer if that will make the chart fit.

5. Click the check box labelled “Point sizes”.
6. Position your pointer over the “Point sizes” menu bar.
7. Press and hold the mouse button while you choose Down by 2, then release the mouse button, as shown in Figure 3-50.

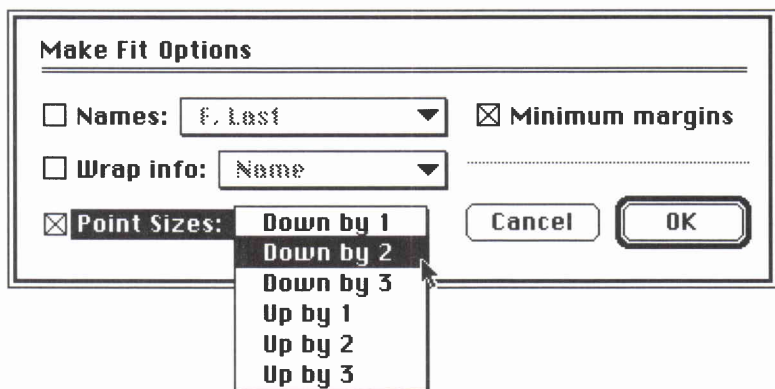


Figure 3-50. Choosing Down by 2

A word about the Make Fit command

Had Org Plus not been able to make the chart fit on one page, it would have displayed a message telling you how much more to reduce the chart to make it fit (Figure 3-52).

Reduction factor

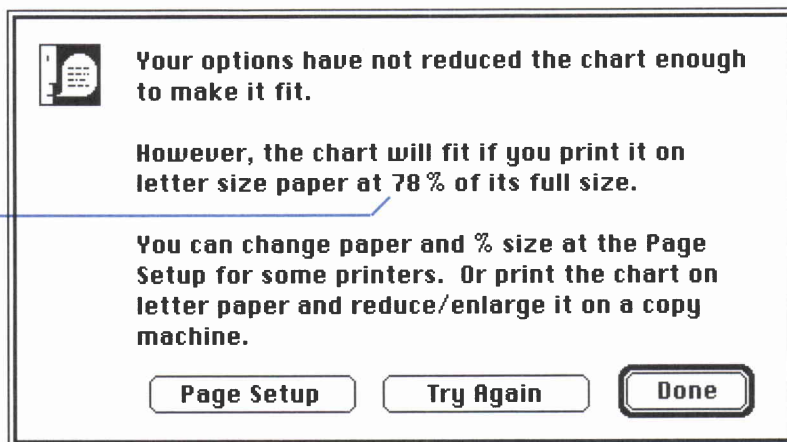


Figure 3-52. Reducing the chart to make it fit

There are two basic ways to make your chart fit in a desired number of pages. One way is to make your chart smaller by using any or all of the methods described earlier in this tutorial. Another way is to reduce the chart image by some percent, as you might on a photocopy machine. The Make Fit command helps you do both. See “Using the Make fit command,” page 139, for more information.

End of Part III

In this part of the tutorial, you’ve learned several commands and techniques for updating your chart:

- *Move boxes and their subordinates* by dragging them *over* the box you want to move them next to.
- *Move scattered boxes* by cutting them and then pasting them onto their new manager.
- *Create subgroups* by selecting the boxes in the subgroup, and then choosing a group style from the Styles menu.
- *Make the chart fit on one page* by changing group styles, changing the page orientation, and using the Make Fit command.

What to do next

To leave the tutorial charts ready for someone else to use, do the following:

1. Choose Close from the File menu.

Org Plus asks you if you want to save the chart.

Don't save the Allen Manufacturing chart under its current name. That would make it hard for other people to do this tutorial.

2. Click No when Org Plus asks if you want to save the chart.

Org Plus has many more commands and capabilities not covered by the tutorial. Before starting your own chart, you might browse Chapter 5, "Reference". It contains a quick overview of the Org Plus menu commands and dialog boxes. Then create your own chart. Refer to Chapter 4, "Using Org Plus," for step by step instructions as needed.

Chapter 4: Using Org Plus

This chapter gives you step by step instructions for creating a chart and giving it exactly the appearance you want. The following table summarizes the things you can do and the pages where you can turn for more information:

To find out about...	Turn to page...
Creating a new chart	74
Creating and deleting boxes	79
Entering information into your chart	84
Selecting boxes and lines	88
Viewing and moving around	93
Changing the label setup	96
Rearranging boxes in your chart	110
Moving boxes in your chart	115
Changing the distance between boxes	119
Making boxes larger or smaller	123
Changing text, lines, and box styles	127
Making your chart more compact	132
Working with multiple charts	145
Creating special effects through showing and hiding	149
Creating special effects through manual drawing	153
Annotating your chart	161
Printing your chart	166
Customizing Org Plus	167

Creating a new chart

You can create a chart from scratch or open a template chart, called **stationery**, and modify it to suit your needs.

Creating a chart from scratch

To create a new chart, do the following:

1. Start the Org Plus application.

See “Starting the program,” page 17, if you need help.

The Startup dialog box appears (Figure 4-1).

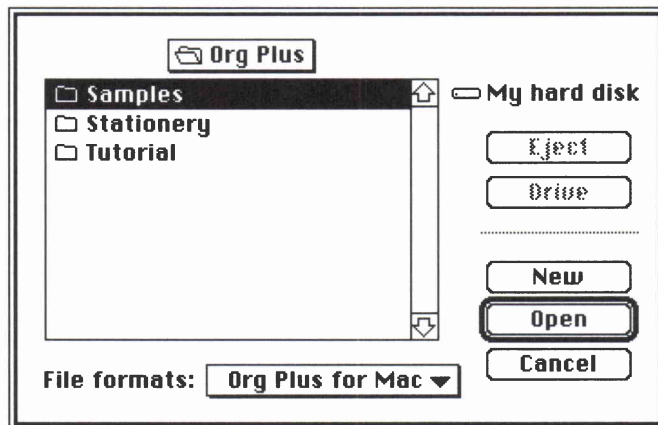


Figure 4-1. The Startup dialog box

2. Click the New button.

The New Chart dialog box appears (Figure 4-2).

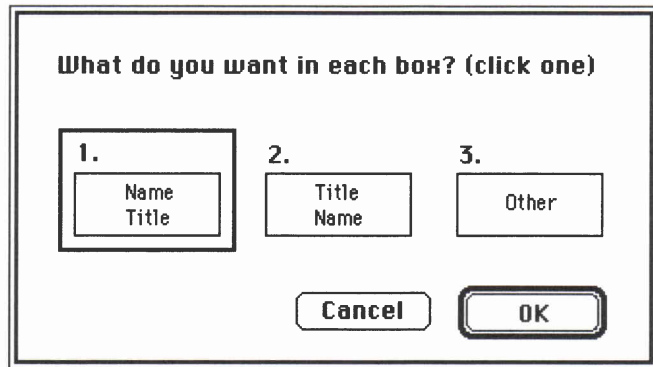


Figure 4-2. The New Chart dialog box.

The information that you enter into each box in your chart must have a label. Org Plus can create a chart with the predefined labels Name and Title, or you can create your own labels.

The labels for the information in your chart and the way they are arranged is called the **label setup**.

3. **Click the label setup that best suits your needs and click the OK button.**

Using a predefined label setup

If you only need to enter names and titles, choose the first or second label setup in the New Chart dialog box. Org Plus starts your new chart with a single box, with the label setup you selected (see Figure 4-3 on page 76).

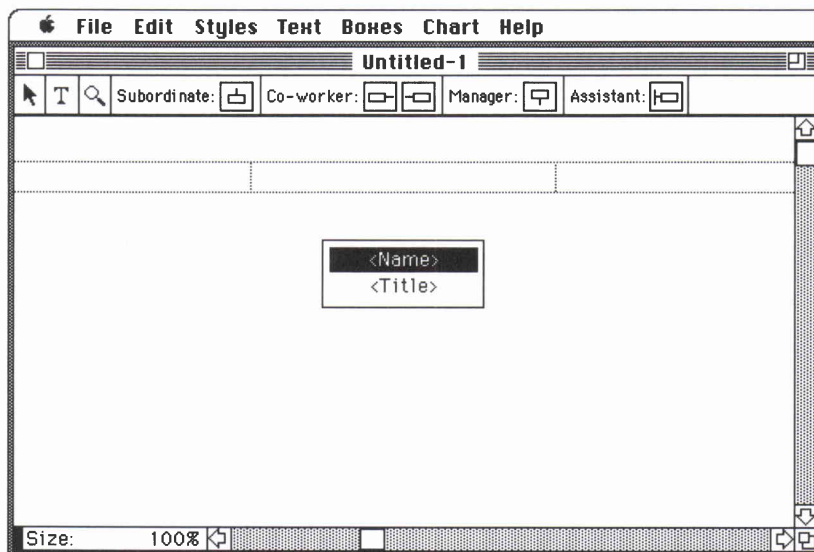


Figure 4-3. A new chart with a predefined label setup

You can then start entering information. See “Entering information,” page 84. You can change the label setup later if necessary. See “Changing the label setup,” page 96 for more information.

Creating your own label setup

If you need to enter more or different information, choose the third label setup. The New Labels Setup dialog box appears (Figure 4-4).

Type the first
label here...

...then click
here to add
more labels

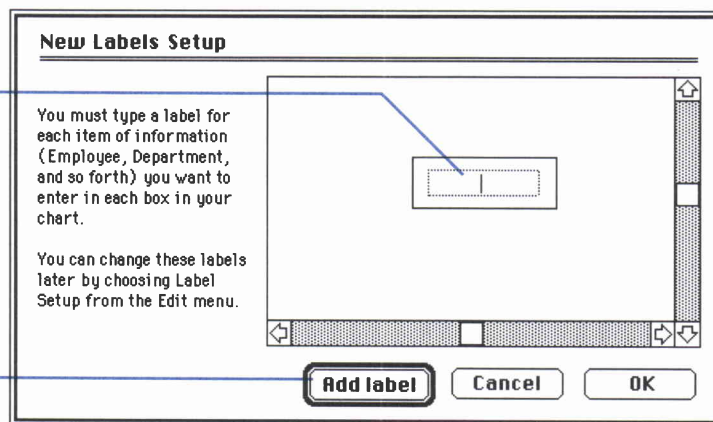


Figure 4-4. The New Labels Setup dialog box

In this dialog box you can type your own labels for the information you want in each box.

To create your own labels, do the following:

1. **Type the label for the first item of information you want to enter in each box.**

The label is automatically centered in the line. You can press Delete to back up in the line and correct any mistakes.

2. **Click the Add Label button and type labels for any additional information you want to enter in each box.**

The figure to the left shows what the box would look like if you typed "Department" and clicked the Add Label button.



To delete the label, press Delete when there is no text in the row. To move from one row to another, press the Tab key.

3. **Click the OK button.**

Org Plus starts your new chart with the labels you created, and ready for you to start entering your information (see Figure 4-5). You can change the label setup later if necessary. See "Changing the label setup," page 96 for more information.

See Figure 4-5 shows what a new chart with the labels Department and Employee would look like.

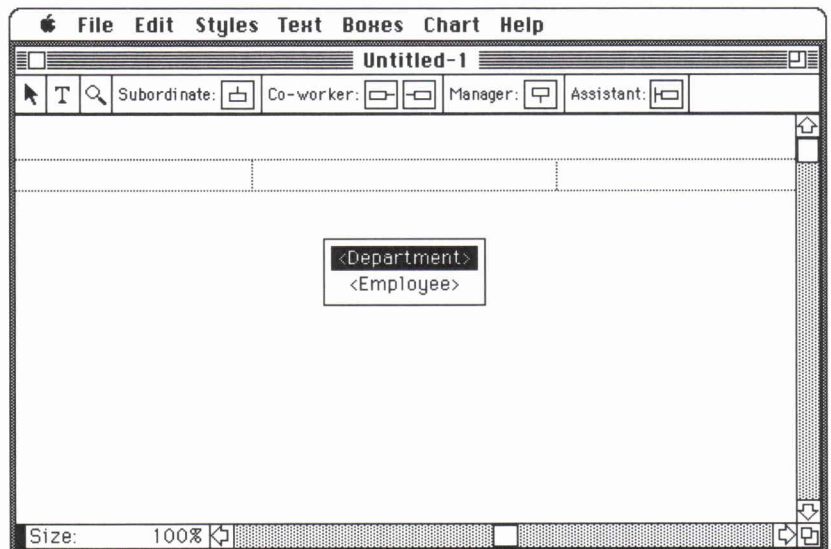


Figure 4-5. A new chart with labels Department and Employee

Using stationery to create a chart

Stationery is a template for a chart. It's like a pad of preprinted charts with empty boxes. When you open a stationery chart, you "tear off" a chart from the pad. You can then modify the chart as needed and save it with a name of your choosing.

The Stationery folder on your *Org Plus Help & Learning* disk contains stationery for organizations of different sizes.

To use existing chart stationery to create your chart, do the following:

1. Open the Org Plus application.

See "Starting the program," page 17, if you need help.

The Startup dialog box appears (Figure 4-6).

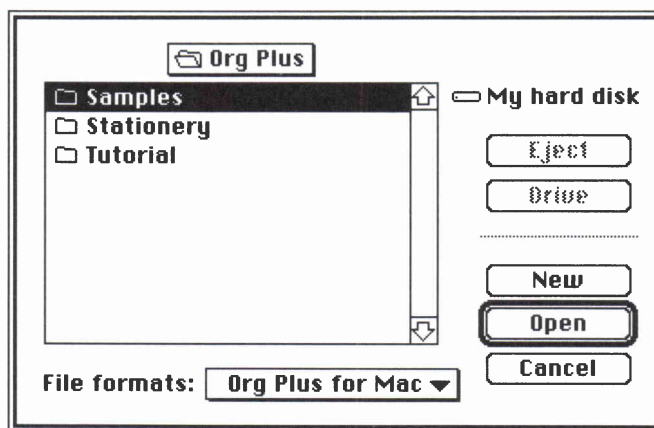


Figure 4-6. The Startup dialog box

2. Open the Stationery folder.

You won't see the Stationery folder if you are using a floppy disk system or didn't install the Stationery folder on your hard disk. You must either create a Stationery folder or copy the Stationery folder from your Org Plus Help & Learning disk to your hard disk. See "Creating your own stationery," page 167, or "Installation," page 7.

To open the Stationery folder, click it, and then click the Open button. You can also double-click the Stationery folder.

You'll see a list of the predefined stationery charts in the Startup dialog box.

3. Open the stationery chart you want.

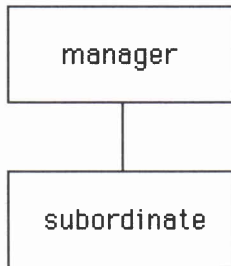
To open a Stationery chart, click it, and then click the Open button. You can also double-click the stationery chart.

Org Plus creates an untitled copy of the stationery chart for you. You can then enter information into the chart or modify it to suit your needs.

See “Creating and deleting boxes,” below, and “Entering information,” page 84 for information on how to continue.

To create a new stationery chart, see “Creating your own stationery,” page 167.

Creating and deleting boxes



You create a *new* box by clicking on an *existing* box with a box tool (see Figure 4-7 on page 81). Org Plus automatically draws the box in the right place and lays out the lines connecting it to the existing box. All boxes are *subordinates to, co-workers of, assistants of, or managers to* existing boxes.

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

The table on the next page summarizes the various ways to create and delete boxes. For more complete instructions, turn to the indicated pages.

To do this...	Do this...
Create a box of any type	Click the tool for the type of box you want to create, then, in the chart, click the box you want to attach it to, page 80 (below)
Create multiple boxes of the same type	Click a box tool multiple times, or press and hold the Option key when you click a box tool, page 81
Insert a box between subordinates and their manager	Select the boxes for which you want to create a new manager, then press and hold down the Command key while you click the Manager box tool, page 82
Convert a box from one type to another	Drag the box so that it attaches to another box as a co-worker or subordinate, page 82
Delete boxes	Select and cut the boxes you want to delete, page 84

Creating any type of a box

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

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

The box tools are located in the tool palette. See Figure 4-7. See “The tool palette,” page 178 for more information.

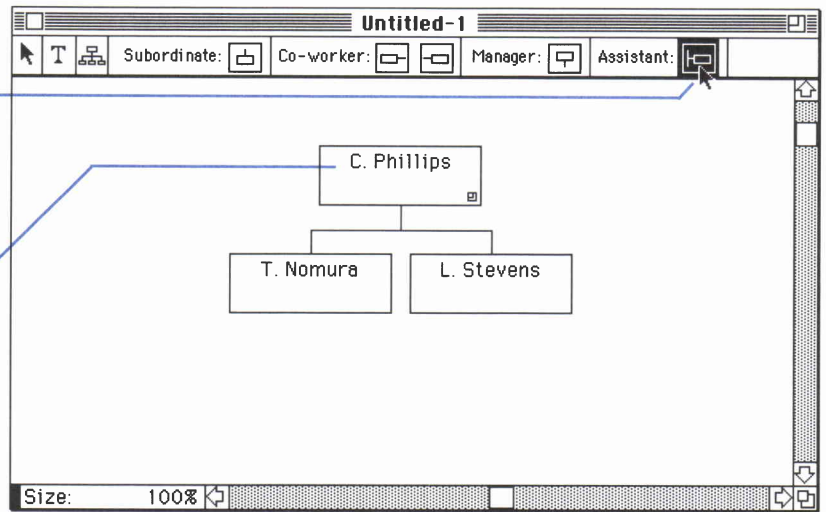
Your pointer changes to a symbol for the type of box you want to create.

- 2. Click the box in your chart to which you want to attach the new box.**

Org Plus creates the desired type of box and reformats your chart (see Figure 4-7).

Click the tool for the type of box you want to create (an assistant in this example)...

...then click the box to which you want to attach the new box



Org Plus draws the box and the connecting lines

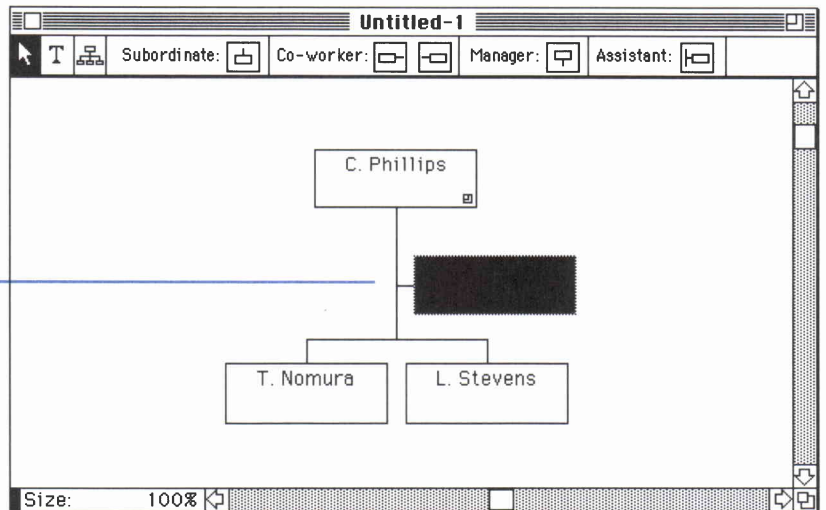
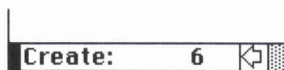


Figure 4-7. Creating boxes

Creating multiple boxes of the same type

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

#1: Click a box tool multiple times



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

The status area in the lower left corner of the window shows the number of boxes that will be created as you click a box tool.

#2: Use the Option key

Hold down the Option key when you click a box tool. You can then create boxes without having to click the box tool each time you want to create a new box. When you are done creating boxes, click the Selection Arrow tool in the top left corner of the window.

If you hold down the Option key *after* you click a box tool, but *before* you click in the chart, you can continue creating boxes so long as you hold the Option key down.

Inserting managers

To insert a new manager between one or more co-workers and their current manager, do the following:

1. **Select the boxes for which you want to create a new manager.**

The boxes you select must belong to the same group and be located next to each other. If not, you can move them next to each other first. See “Moving boxes,” page 115 for information.

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

Converting boxes from one type to another

To convert a box from one type to another, you can drag it from its current location and reattach it to another box in your chart as a co-worker before, co-worker after, or subordinate. For example, to convert an assistant box to a regular subordinate box, drag the assistant box over a non-assistant box so that it becomes a co-worker to that non-assistant box. For more information, see “Moving boxes in your chart,” page 115.

To convert a non-assistant box to an assistant box, select it and choose an assistant style. See “Changing assistant styles,” page 113, for additional information.

Alternate ways to create boxes

In addition to the techniques for creating boxes described earlier in this chapter, you can create boxes by selecting an existing box first, *then* clicking a box tool or typing a Command key equivalent:

1. **Click the box to which you want to attach a new box.**
2. **Press and hold the Command key while you click a box tool.**

OR...

Press and hold the Shift and Command keys while you type a letter for the type of box you want to create:

<u>To do this...</u>	<u>Press this...</u>
Create a subordinate to the selected box	Shift-Command-S
Create a co-worker before (to the left or above) the selected box	Shift-Command-B
Create a co-worker after (to the right or below) the selected box	Shift-Command-A
Create a manager for the selected box	Shift-Command-M
<u>Create an assistant to the selected box</u>	<u>Shift-Command-I</u>

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

Deleting boxes

To delete one or more boxes, select the boxes you want to delete and choose Cut from the Edit menu.

You can also press Command-X.

Boxes that you cut are put in a special storage place called the **Clipboard** so that you can then paste them someplace else if you want. If you don't want to cut them to the Clipboard, you can choose Clear from the Edit menu, press Command-Y, or press Delete.

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

Entering information

To enter information into a box, click the box once to select it, then a second time to enter information.

To enter information associated with a particular box, but not visible in the chart, see "Seeing and editing information not shown in your chart," page 86.

To enter information *not* associated with a particular box, such as the title for your chart or other annotations, see "Annotating your chart," page 161.

To change the way information is arranged in a box, see "Changing the label setup," page 96.

Entering new information

Follow these steps to enter information into an empty box:

1. **Click once on the box whose information you want to enter.**

Org Plus highlights the box. The arrow pointer changes to an I-beam when moved over an area where you can enter text.

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

You can also press Return or Enter.





Org Plus shows the box with labels for the information you can enter.

3. **Start typing.**

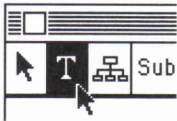
The label goes away and your text appears.


4. **Click any other label for which you want to enter information, and then type the information.**



Pay attention to the labels: Be sure to enter the information called for by the label. That way you can easily move or change the information later by moving or changing the labels. See “Changing the label setup,” page 96.

Editing existing information



The I-beam: 

To edit existing information, click the box whose information you want to edit, then click with the I-beam pointer in the text you want to edit.

To make changes to text throughout your chart, press and hold the Option key while you click the Text tool in the top left corner of the window. This gives you an I-beam pointer until you click the Selection Arrow tool (next to the Text tool). You can then click directly on any text you want to edit.

Editing shortcuts

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

To do this...	Press this...
Select the next label in the box	Tab, Return, Right Arrow, Down Arrow
Select the previous label in the box	Shift-Tab, Left Arrow, Up Arrow
Enter information for the next co-worker, if any	Option-Right Arrow
Enter information for the previous co-worker, if any	Option-Left Arrow

Entering people's names

When entering people's names, always type the person's complete name. Org Plus has special commands for abbreviating or formatting names any way you want, provided it knows the complete name to begin with. See "Formatting people's names," page 108, for instructions.

Seeing and editing information not shown in your chart

The edit panel lets you see and edit all the information for any box in your chart. Use the edit panel when:

- You want to see your chart at a reduced view, but still see and edit the information in any box. (See "Viewing your chart at actual and reduced sizes," page 93.)
- Some of the information for a box is not currently visible in the chart. You can hide information by hiding its label at the Label Setup dialog box. (See "Hiding and showing labels," page 104.)

You can also use the edit panel to speed data entry. See Appendix B, "Time Saving Measures," page 211.

To use the edit panel, do the following:

1. Click the box whose full set of information you want to see or edit.

2. Choose Show Edit Panel from the Chart menu.

You can also press Command-E.

Org Plus opens the edit panel, as illustrated in Figure 4-8.

3. Click in the text you want to change, and make the changes.

4. Select other boxes whose information you want to see or edit.

5. When you're done, choose Hide Edit Panel from the Chart menu.

You can leave the edit panel open as long as you want, but it slows down operation a bit.

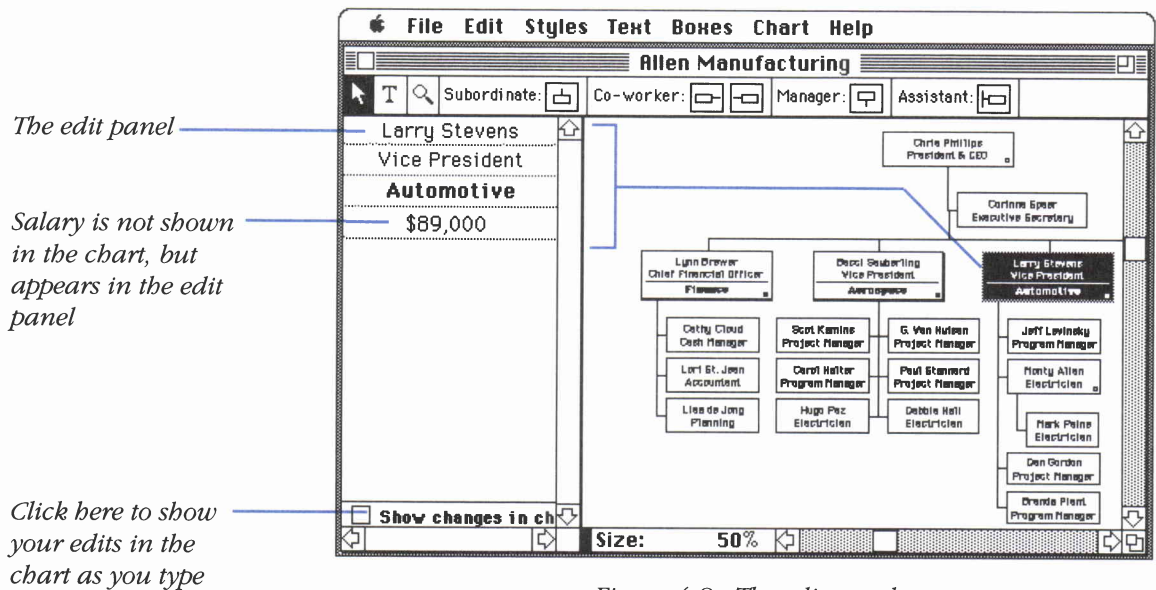


Figure 4-8. The edit panel

Starting out, what you type in the edit panel doesn't appear in the chart until you select a different box. To make it appear in the chart as you type, select the check box labelled "Show changes in chart," located at the bottom of the edit panel (see Figure 4-8).

Selecting boxes and lines

In order to change a box or line, you must first select it. The following table summarizes the various ways you can select things. For more complete instructions, turn to the indicated pages:

To do this...	Do this...
Select a single object (box, line, text, and so on)	Click with the arrow pointer, page 88
Select multiple objects	Shift-click* with the arrow pointer, page 89, OR ... Drag an outline around the objects, page 89
Select all objects of the same type	Choose a command from the Select submenu, located in the Edit menu, page 90
Select a group	Double-click any box in the group, page 90, OR ... Select a box in the group and press Command-G, page 90
Select a branch	Select the topmost box in the branch and press Command-B, page 90
Select all boxes in one or more levels	Choose Select Level from the Edit menu and type in the levels you want, page 91
Select all boxes	Choose All Boxes from the Select submenu located in the Edit menu, or press Command-A, page 92

* To “Shift-click,” hold the Shift key while you click with the mouse.

Selecting a single object

You can select any single object in your chart by placing the arrow pointer over it and clicking.

Selected boxes are highlighted and selected lines are made gray.

Selecting multiple objects

To select multiple objects, Shift-click them or drag an outline around them with the arrow pointer (see Figure 4-9).

By Shift-clicking

To select objects in scattered locations, press and hold the Shift key while you click them. To remove any individual item from the selection, click the selected object a second time while keeping the Shift key pressed down.

By dragging an outline

To select objects located next to each other, drag an outline around them (see Figure 4-9).

Click the Selection Arrow tool to get the arrow pointer, if necessary...

...position the pointer over one corner and press the mouse button...

...drag to the opposite corner and release the mouse button

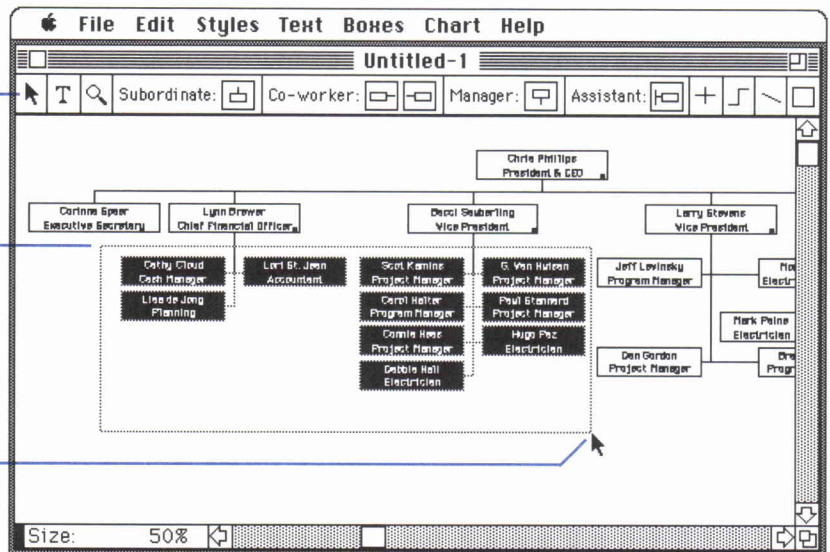


Figure 4-9. Selection by dragging an outline around objects

Objects are highlighted when they are **completely** within the outline, as shown in Figure 4-9.

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

Selecting all objects of the same type

To select all objects of the same type, make a selection from the Select submenu, located in the Edit menu (Figure 4-10).

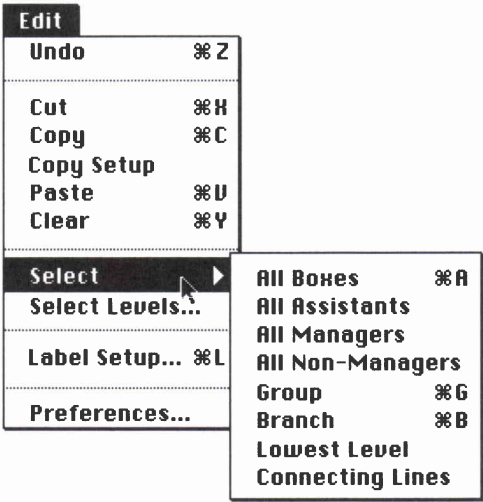



Figure 4-10. The Select submenu

 *Why would I want to select all objects of the same type?* You might want to select all manager boxes in order to give them a shadow.

Selecting a group

To select a **group** — all boxes reporting to the same manager — double-click any box within the group.

You can also select any box within the group, then choose Group from the Select submenu or press Command-G.

Selecting a branch

To select a **branch** — a manager box and all its subordinates — first select the manager box then choose Branch from the Select submenu or press Command-B.

Selecting all boxes at the same level

The topmost box in your chart is at level 1. The boxes reporting directly to it are at level 2. The boxes reporting to them are at level 3, and so on. The black boxes in Figure 4-11 are at level 4.

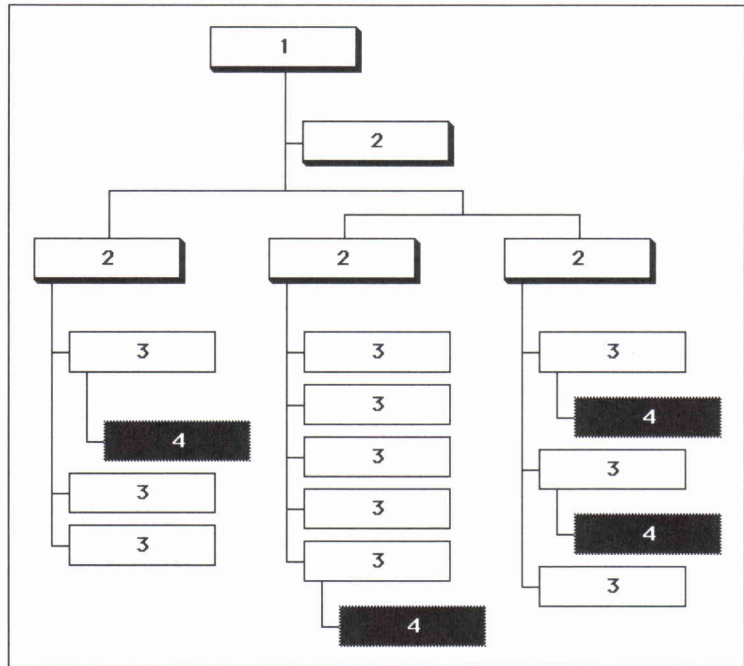


Figure 4-11. Levels in a chart

To select all boxes at the same level, choose Select Levels from the Edit menu. Org Plus displays the Select Levels dialog box, pictured in Figure 4-12.

Select Levels

Select all boxes at levels: 1 through 4

Cancel OK

Figure 4-12. The Select Levels dialog box

Enter the levels of the boxes you want to select and click the OK button. For example, to select all the boxes at level 4, as shown in Figure 4-11, you would enter "4" in both places in the dialog box and click the OK button.

To select one level only, enter the same number in both text boxes and click the OK button.



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

See “Changing the label setup,” page 96, and “Changing text, lines, and box styles,” page 127 for ways to change the visual characteristics of boxes.

Selecting all boxes

To select all the boxes in your chart, choose All Boxes from the Select submenu, or press Command-A.

Keyboard shortcuts for selecting boxes

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

To do this...	Press this...
Select all boxes and lines	Command-A
Select a group	Select a box in the group, then press Command-G
Select a branch	Select the topmost box in the branch, then press Command-B
Select the co-worker above or to the left	Option-Left Arrow
Select the co-worker below or to the right	Option-Right Arrow
Select the current box's manager	Option-Up Arrow
Select the current box's first subordinate	Option-Down Arrow

Org Plus has many other keyboard and mouse shortcuts for common operations. See Appendix C, “Keyboard and Mouse Shortcuts,” page 215.

Viewing and moving around your chart

This section describes how you can view your chart and quickly move around in it. You can use the scroll bars, or any of the Org Plus special commands for this. You may find that the easiest way to move around your chart is with the Reduce/Enlarge tool. See “Using the Reduce/Enlarge tool,” page 94.

The following table summarizes the various ways you can view your chart and move around in it. For more complete instructions, turn to the indicated pages:

To do this...	Do this...
View your entire chart in the window, at actual size, or at 50% of actual size	Make a choice from the Chart menu, page 93
Switch between reduced and actual size views of your chart	Use the Reduce/Enlarge tool, page 94
Move to the left, right, up, or down in your chart	Use the scroll bars, OR... Use a keyboard shortcut, page 95
See any box in your chart at actual size	Press and hold the Control key while you click the box you want to magnify, page 94

Viewing your chart at actual and reduced sizes

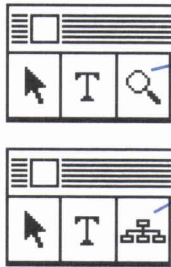
- To change how much of your chart you can see at any one time, make a choice from the Chart menu.
- To get a bird’s eye view of your chart, choose Size to Window.
 - To see as much as possible while keeping the text as legible as possible, choose 50% of Actual.
 - To see how any part of your chart will look when printed, choose Actual Size.

You can also press the Command key equivalents.

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

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

Using the Reduce/Enlarge tool



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

If your chart is shown at 50% of actual or sized to the window, you'll see a magnifier (see the figure to the left).

If your chart is shown at actual size, you'll see a little chart (see the figure to the left).

You can use the Reduce/Enlarge tool to switch between Size to Window and Actual Size. Click the tool, then click in the area of your chart you want to reduce or enlarge.

If your chart is at actual size, a click shows the entire chart.

If your chart is reduced, a click magnifies the area under your magnifier.

See any box in your chart

You don't have to click the Reduce/Enlarge tool. You can also press and hold the Control key (if your keyboard has one). This gives you a convenient way to see any box in your chart:

If you can see the entire chart: hold the Control key and click the box you want to see more closely.

If you can't see the entire chart: hold the Control key and click anywhere in your chart. You'll see the entire chart. With the Control key still down, click the box you want to see more closely.

Moving left, right, up, or down

You can use the standard Macintosh scroll bars to scroll through your chart. If you don't know how to use the scroll bars, see your Macintosh owner's manual.

Keyboard shortcuts for viewing and moving

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

To do this...	On any keyboard	Ext. keyboard
See your entire chart in the window (size it to fit in your window)	Command-I	Command-I
See your chart at 50% of actual size	Command-J	Command-J
See your chart at actual (printing) size	Command-K	Command-K
See the part of your chart above the window	Command-Up Arrow	Page Up
See the part of your chart below the window	Command-Down Arrow	Page Down
See the part of your chart to the left of the window	Command-Left Arrow	Command-Page Up
See the part of your chart to the right of the window	Command-Right Arrow	Command-Page Down
See the topmost box in your chart	Option-Command-Up Arrow	Home
See boxes at the bottom of your chart	Option-Command-Down Arrow	End

Org Plus has many other keyboard and mouse shortcuts for common operations. See Appendix C, "Keyboard & Mouse Shortcuts," page 215.

Changing the label setup

The labels for the information you enter into the boxes in your chart, and the way they are arranged, is called the **label setup**. The label setup is like a blueprint for the information you want in each box.

<Name>
<Title>

When you created your chart, you either selected a predefined label setup, like the one shown in the figure to the left, or you created a new one.

You can change or add to the label setup at the Label Setup dialog box (see Figure 4-13 on page 98). The label setup determines which information appears in your chart and in what order. For example, to enter department names in each box, you create a Department label first in the Label Setup dialog box. To move the titles above the names in your chart, you move the Title label above the Name label in the Label Setup dialog box. In other words, whatever you do to the labels in the Label Setup dialog box, Org Plus does to the information in your chart.

You can create up to 24 different labels for your chart, and devise almost any conceivable label setup at the Label Setup dialog box. You can give each label its own type font, style, and size.

You can also create different label setups for different boxes. For example, you can modify the label setup for non-manager boxes to show names only, but show both names and titles in manager boxes.

The following table summarizes the ways you can change the label setup. For more complete instructions, turn to the indicated pages:

To do this...	Do this...
Create labels for the information in each box in your chart	Type the labels in any dotted area of the Label Setup dialog box, page 100
Create areas in which to type labels	Click Add Label button, or any of the label area buttons, page 100
Delete label areas	Click in the label area and click the Del button, page 102

To do this...	Do this...
Move labels in the label setup	Cut a label, then paste it where you want to move it, page 102
Hide or show labels	Click the label you want to hide, then click the Hide Label button, page 104
Create dividing lines	Click the dividing line buttons, page 106
Change margins within a box	Drag the edges of the inside label areas, page 107
Rename labels	Double-click the label you want to rename, then type the new label name at the Change Label dialog box, page 108
Delete labels	Double-click the label you want to delete, then click the Delete button in the Change Label dialog box, page 108
Format people's names	Double-click the label you use for people's names, then click the "Format..." check box in the Change Label dialog box, page 108
Show labels before information in your chart	Double-click the label you want to show in your chart, then click the "Show label..." button in the Change Label dialog box, page 109
Copy the label setup of one box to other boxes	Select the box whose setup you want to copy, choose Copy Setup, from the Edit menu, then paste it to the boxes you want to change, page 109

The Label Setup dialog box

You change the label setup for all or selected boxes at the Label Setup dialog box (Figure 4-13). You can get to the Label Setup dialog box by choosing Label Setup from the Edit menu.

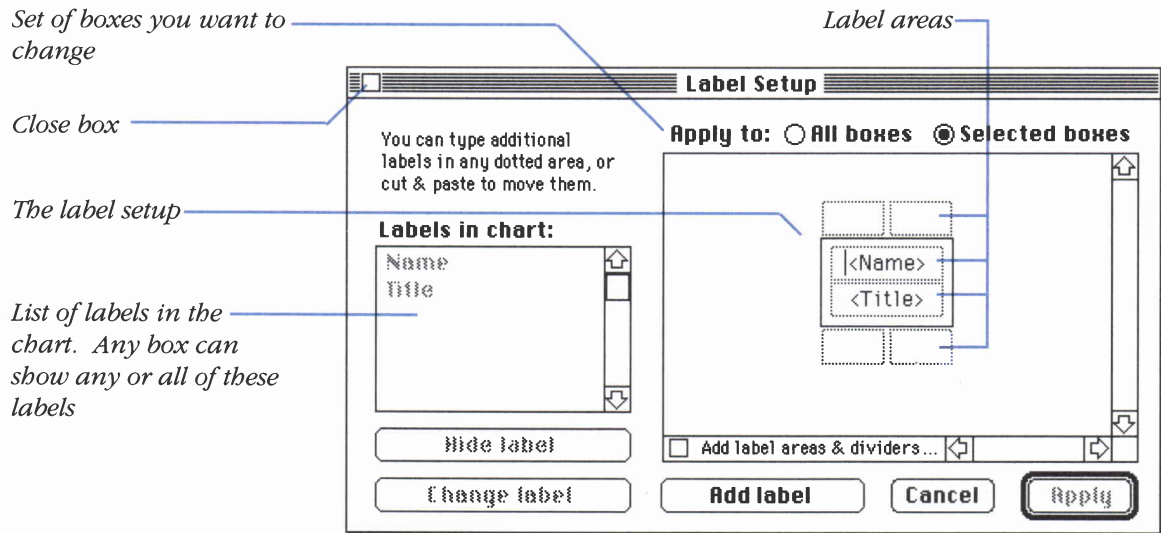


Figure 4-13. The Label Setup dialog box

The label setup is shown in the box to the right. Scroll this window if the label setup gets larger than the window.

The dotted rectangles within the setup are called **label areas**. You can type a label in any label area, whether it is inside or outside the box. You can also create additional label areas. See “Creating additional label areas,” page 100, for more information.

All the labels that have been created for your chart are shown in the list on the left in the dialog box. When you create a label, Org Plus automatically adds it to this list. You can move labels from the list into the setup, or vice versa. See “Moving labels,” page 102.

The radio buttons at the top of the Label Setup dialog box let you apply the changes you make in the dialog box to the currently selected boxes only, or to all the boxes in your chart.

The other buttons and controls in the Label Setup dialog box let you change labels and their setup. Their purposes are described in the following pages.

How to change the label setup

You can change the label setup for all boxes, or for selected boxes only:

- 1. Select the boxes whose label setup you want to change.**

If you want to change the label setup for all boxes, press Command-A. (If you don't select any boxes, Org Plus assumes you want to change all the boxes.)

- 2. Choose Label Setup from the Edit menu.**

The Label Setup dialog box appears (Figure 4-13 on page 98).

- 3. Make the changes you want to make.**

See the following sections for information about the various changes you can make at the Label Setup dialog box.

- 4. Click the Apply button.**

If your screen is large enough, you can drag the Label Setup dialog box to the side so that you can see both your chart and the dialog box at the same time.

When you click the Apply button, Org Plus makes the same changes to the information in your chart that you made to the labels in the Label Setup dialog box.

- 5. Repeat steps 3 and 4 to make and apply additional changes.**

- 6. Click the close box to close the dialog box.**

The close box is located in the upper left corner of the dialog box.

You don't have to click the close box to return to your chart. Just click in the chart.

Creating labels


You must create labels for new information before you can enter it into the boxes in your chart. For example, if you want to enter department names, you must create a “Department” label.


To create a label, click the Add Label button in the Label Setup dialog box.

Org Plus creates a label area below the current one (the one with the blinking insertion point). You can then type the new label. Don't type angle brackets (see note below).

You can type several labels in a single label area. Click in the beginning of the label area and type the additional label. Do this if you want to join separate pieces of information together on a single line, such as City, State, and Zip.

You can create additional label areas and leave them empty or type labels in them. See “Creating additional label areas,” below.

 *About angle brackets (<>):* When you create a new label, Org Plus automatically puts angle brackets around it. The angle brackets help you distinguish between labels and the information you have typed in your chart.

 *New labels appear in the boxes currently selected in your chart, but can appear in any box in the chart:* You can create up to 24 labels for a single chart. Each box can contain all or some of those labels. When you create a label, that label appears in the selected boxes only, but you can make it appear in other boxes as well. See “Hiding and showing labels,” page 104.

Creating additional label areas

The dotted rectangles in the setup are called **label areas**. You can type labels in label areas.

To create additional label areas, click the check box labelled “Add label areas & dividers,” immediately above the Add Label button (Figure 4-14). Org Plus reveals the label area buttons.

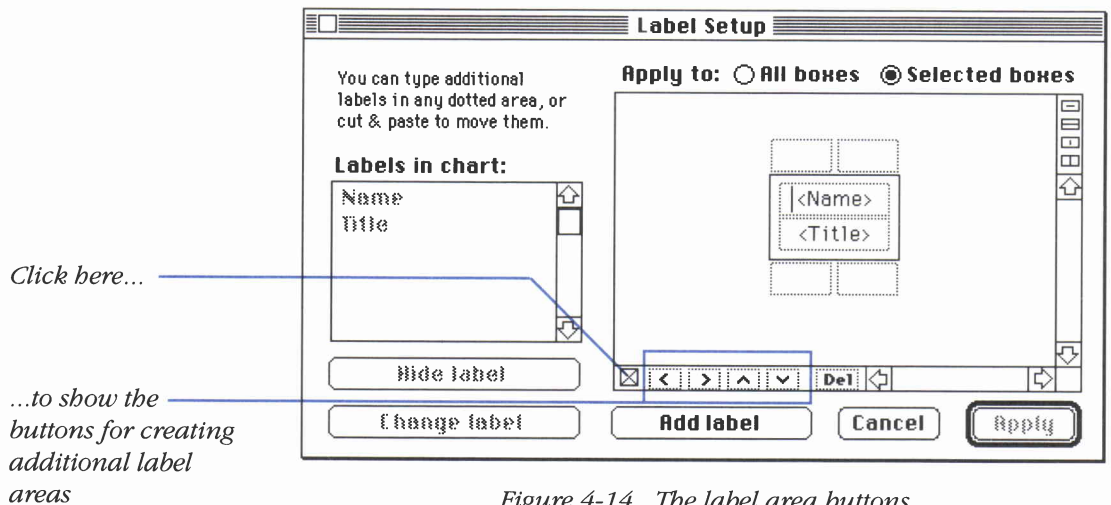


Figure 4-14. The label area buttons

Click a label area button to create a label area to the left, to the right, above, or below the current label area (the one with the blinking insertion point in it). Org Plus reformats the label setup automatically.

You can use the label area buttons to create almost any conceivable arrangement of label areas (see Figure 4-15). You can create label setups with multiple columns, or multiple rows for the exterior label areas. You can type labels in any of the label areas.

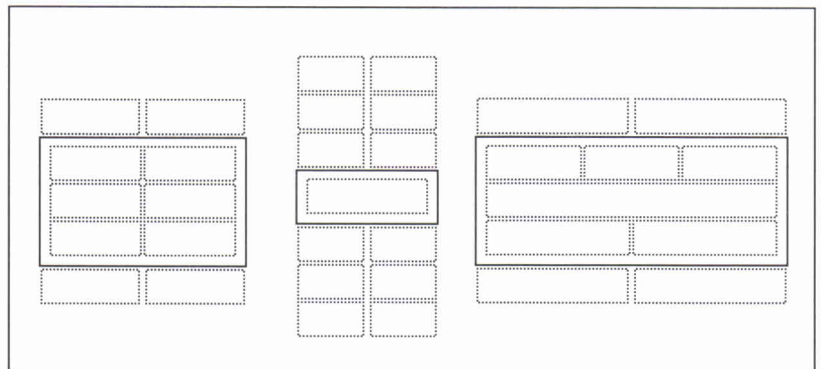
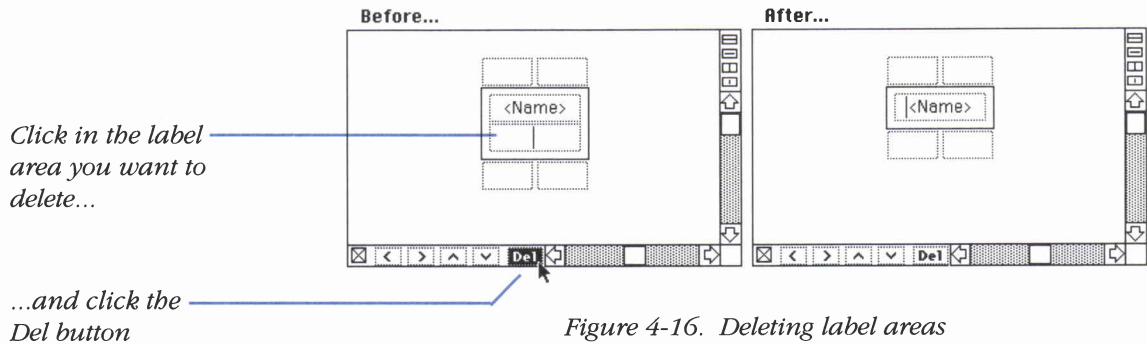


Figure 4-15. Creating complex label setups

Deleting label areas

To delete a label area, click in the label area, then click the Del button next to the horizontal scroll bar, as shown in Figure 4-16.



If the Del button isn't visible, click the check box labelled "Add label areas & dividers," *then* click the Del button.

You can also delete an empty label area by clicking it and pressing the Delete key.

When you delete a label area, you do *not* delete a label or any information in your chart. If the area contains a label, Org Plus moves the label to the list on the left in the dialog box. You can then move the label back into a different label area in the label setup. See "Hiding and showing labels," page 104.

Moving labels

Why would you want to move labels? You move labels in order to move the information that you've already typed into the boxes in your chart.

For example, Figure 4-17 shows a chart with names located above titles. Move the Name label into the bottom label area, and the Title label into the top area, click the Apply button in the Label Setup dialog box, and presto! — the information is reversed in your chart, as shown in Figure 4-18.



Reverse the order of the labels in the label setup...



...to reverse the order of the information in the chart

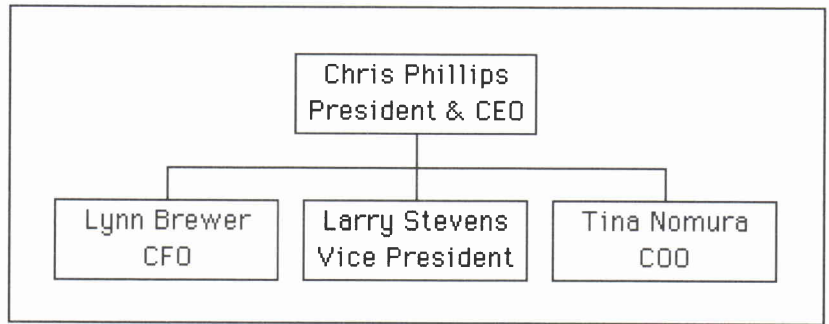


Figure 4-17. Name above title

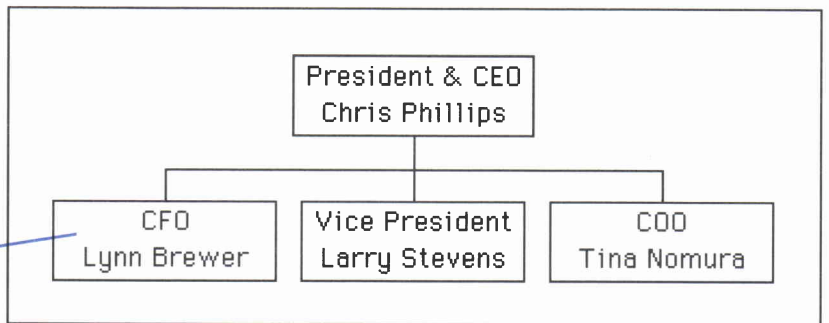


Figure 4-18. Title above name

You can cut and paste to move labels within the label setup:

- 1. Click the label you want to move.**
- 2. Choose Cut from the Edit menu.**

The label is removed from the label setup and appears highlighted in the list of labels on the left in the dialog box.
- 3. Click in the label area where you want to move the label.**
- 4. Choose Paste from the Edit menu.**

Org Plus inserts the label at the insertion point.

Hiding and showing labels

Why would you want to hide or show labels? Sometimes you may not want to show certain information in your chart. For example, you might want to show grade level information for some employees but not for others. Or perhaps you want to print your chart *with* salary information for the President of the company, and *without* salary information for everyone else.

To remove a label from the setup, click the label you want to remove, then click the Hide label button (see Figure 4-19).

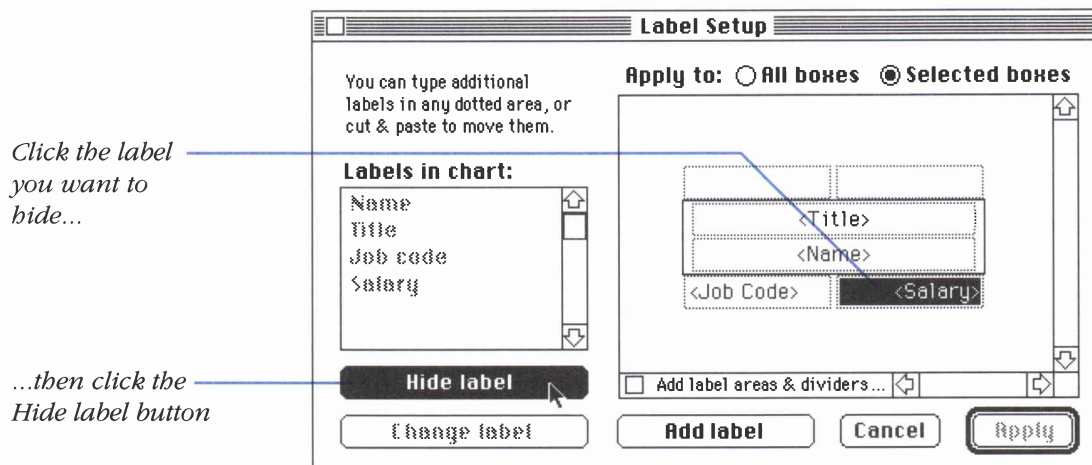
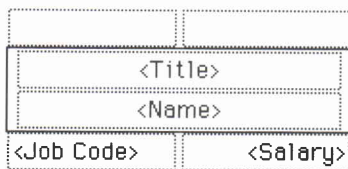


Figure 4-19. Hiding information

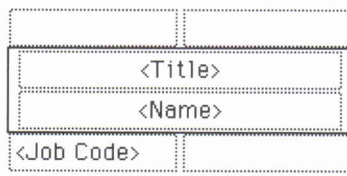
Figure 4-20 shows a chart before and after hiding the Salary label.

To move a hidden label back into the setup, click the label in the label list and click the Show button (see Figure 4-21). The label appears at the insertion point in the setup.

This button alternates between “Hide label” and “Show label” depending on whether the selected label appears or doesn’t appear in the setup.



*Hide the Salary label
(remove it from the
label setup)...*



*...in order to remove it
from the chart*

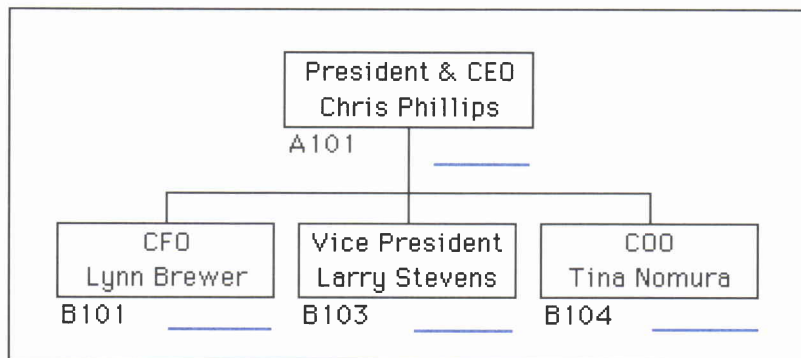
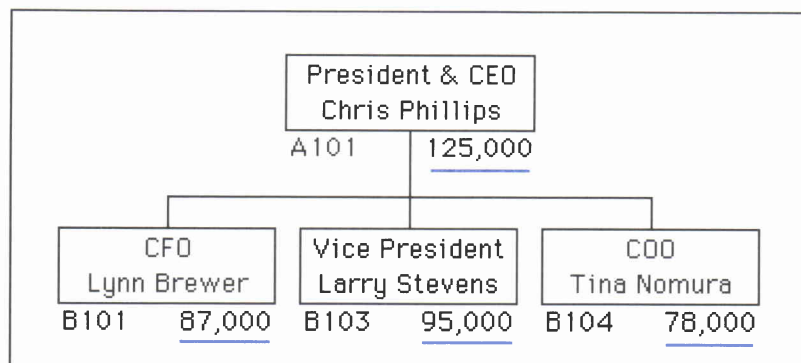


Figure 4-20. Hiding salary information

*Click where you want
to put the hidden
label...*

*...click the label you
want to show in the
chart...*

*...then click the
Show label button*

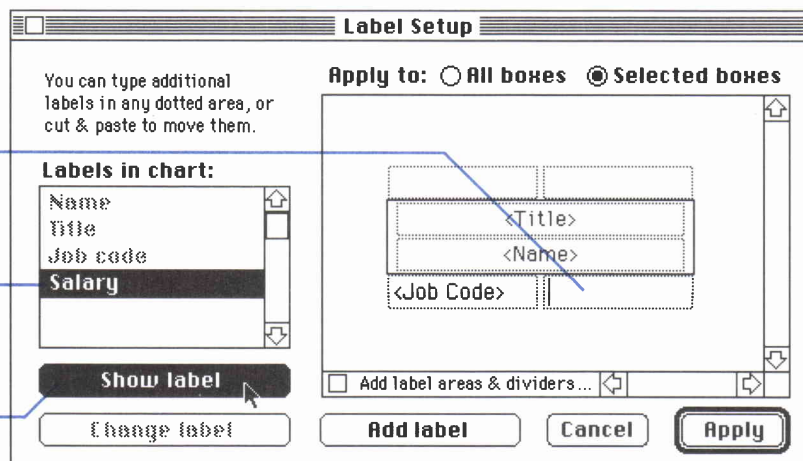


Figure 4-21. Showing information

Creating dividing lines

You can draw horizontal and vertical dividing lines within a box to separate information.

To draw dividing lines, click the check box labelled “Add label areas & dividers,” immediately above the Add Label button (see Figure 4-22). Org Plus reveals the dividing line buttons.

Select this to show the
dividing line buttons
(upper right corner)

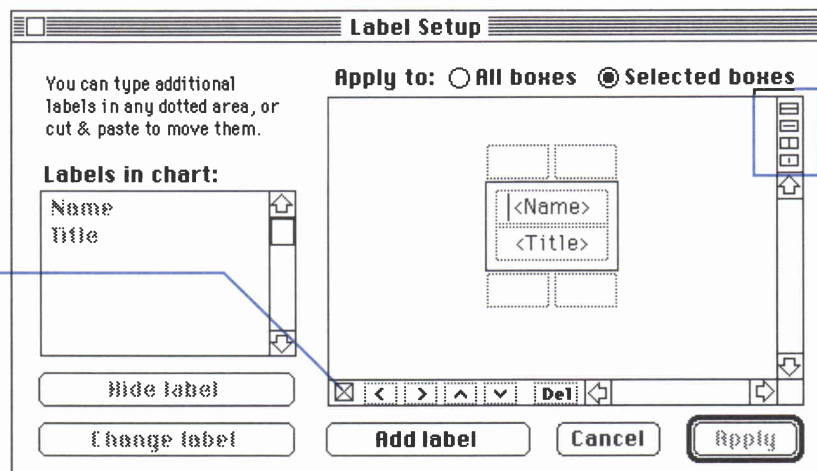
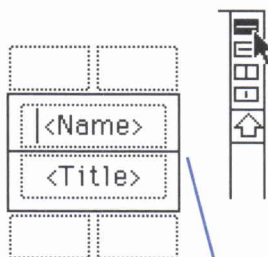


Figure 4-22. The dividing line buttons

Click a dividing line button to divide the box vertically or horizontally. Click again to remove the line if you don't like it.



For example, to draw a dividing line between Name and Title, click the first dividing line button, as shown in the figure to the left. A line appears below Name. When you click the Apply button in the Label Setup dialog box, Org Plus draws a line below the names in the selected boxes (see Figure 4-23).

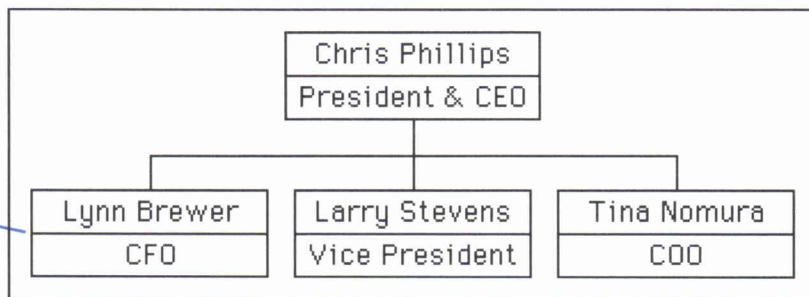
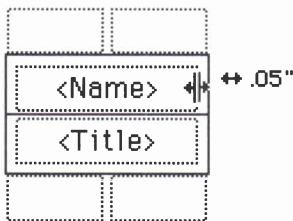


Figure 4-23. Drawing dividing lines

To create horizontal dividing lines, you must have at least two rows of label areas inside the box. To create vertical dividing lines, you must have at least two columns of label areas inside the box.

Org Plus draws the dividing lines below or to the right of the label area containing the insertion point. If the insertion point is in the bottom row or rightmost label area, however, it draws the line above or to the left of the label area.

Changing margins within a box



Box margins are the amount of space between the box border and the labels within the box.

To change box margins, position your pointer over the edge of a label area, as shown in the figure to the left. A special pointer appears automatically. Drag the margin to the desired distance from the box border. As you drag, Org Plus shows the actual width of the margin. When you release the mouse button, the margin is set.

You can set top, bottom, left, and right margins. The margins are preset to .05".

Changing labels

You can rename, delete, and make other changes to any label at the Change Label dialog box (Figure 4-24). To make this dialog box appear, click a label in the label setup or in the list of labels, then click the Change label button in the Label Setup dialog box.

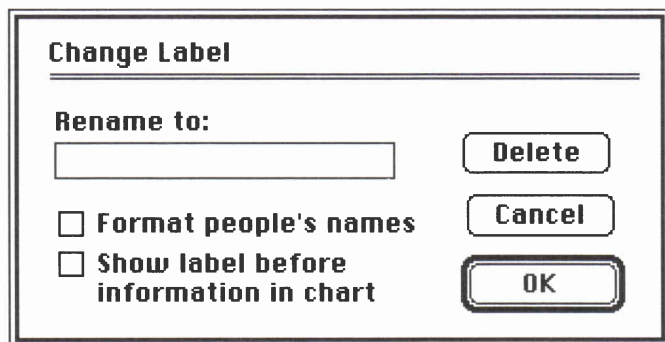


Figure 4-24. The Change Label dialog box

You can also make this dialog box appear by double-clicking the label you want to change in the Label Setup dialog box.

Renaming labels

To rename a label, double-click the label you want to rename at the Label Setup dialog box. The Change Label dialog box appears (Figure 4-24). Type the new label.



The label is renamed for every box in your chart, regardless of which boxes are currently selected.

Deleting labels

Why would you want to delete a label? Deleting a label is a quick way to delete information in the boxes in your chart. When you delete a label, Org Plus deletes all the information that has that label. For example, if you delete the Department label, Org Plus deletes all the departments in your chart.

To delete a label, double-click the label you want to delete at the Label Setup dialog box. The Change Label dialog box appears (Figure 4-24 on page 107). Click the Delete button.

Org Plus warns you before deleting so that you can cancel the operation if you want.



Deleting labels is very different from simply hiding them. When you hide labels, you hide the information in the chart, but that information is still in the chart document, although not visible in the boxes of the chart. You can make it visible again. See “Hiding and showing labels,” page 104. When you delete a label, you permanently remove it and all the information which has that label.

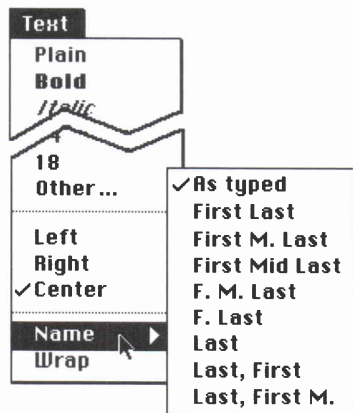
Formatting people's names

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


If you have people's names in your chart, you can format them in any of the ways shown in the Name submenu (see figure to the left).


In order to format names automatically, Org Plus needs to know which label you use for people's names. (This is usually the label called “Name,” but you might have created a label called “Employee” or “Prospect” or anything else for that matter.)

To format people's names in your chart, double-click the label that you use for names in the Label Setup dialog box. The Change Label dialog box appears. Click the “Format people's names” check box. Thereafter, you can select any box in your chart with a name in it, and then choose any name formatting command to reformat the name



automatically. See “Changing people’s name formats,” page 129, for more information.

 *You can format only one person’s name per box.*

 *When entering people’s names in your chart, always type the complete name.* You can change the format for it later. See “Entering people’s names,” page 86 for more information.

Showing labels in your chart

<Name>
<Age>

Tom Jones
25


Tom Jones
Age: 25

When you click twice on an empty box in your chart, labels appear in the box to show you what to type, as shown in the first figure to the left.

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

In some cases, however, you may want to see the label along with the information. For example, numbers are usually not self-explanatory. You can tell Org Plus to show the label *before* the information, as shown in the figure to the left.

If you want to do this, double-click the label that you want to show in the Label Setup dialog box. The Change Label dialog box appears. Click the “Show label before information in the chart” check box.

 *Remember:* Showing labels in your chart may make your chart clearer to others, but it may make the boxes — and therefore the chart — wider as well.

Copying the label setup

You can copy the label setup from one box to any other box:

1. **Select the box whose setup you want to copy.**
2. **Choose Copy Setup from the Edit menu.**
3. **Select the box or boxes to which you want to give the same setup.**
4. **Choose Paste Setup from the Edit menu.**

Org Plus copies the label setup along with the box border and box shadow, if any.

Rearranging boxes in your chart

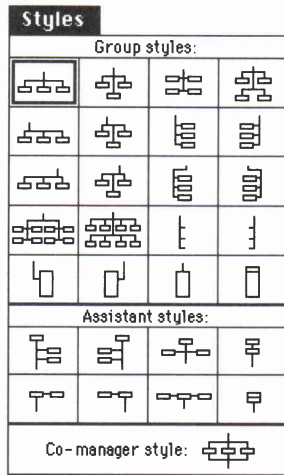
All boxes belong to a **group**. A group consists of all the boxes having the same manager, excluding assistant boxes, which form their own group.. A chart is usually made up of many groups.

To rearrange a group of boxes, select the group you want to rearrange and choose a group style from the Styles menu. You can also create and rearrange subgroups and assistants.

The following table summarizes the various ways you can rearrange boxes. For more complete instructions, turn to the indicated pages:

To do this...	Do this...
Rearrange the boxes in a group	Double-click any box in the group and choose a group style from the Styles menu, page 111
Create and arrange a subgroup	Select the boxes in the subgroup and choose a group style, page 111
Rearrange a subgroup	Double-click any box in the subgroup and choose a group style, page 112
Merge separate subgroups back into a single group	Select all the boxes in the subgroups and select a group style, page 112
Change the way assistants are arranged	Select the assistants and choose an assistant style, page 113
Create a co-manager relationship	Select the co-manager boxes, then choose the co-manager style, page 114

Changing group styles



You can arrange groups in 20 different ways, called **group styles** (see figure to the left). Every group in a chart can have its own style.

To change the style for any group in your chart, double-click any box in the group to select the group and choose a group style from the Styles menu.

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

Org Plus reformats your chart automatically.

You can change the style of multiple groups simultaneously: press and hold the Shift key while double-clicking on boxes in different groups to select them; then choose a group style from the Styles menu.

Creating subgroups

A **subgroup** is a grouping of boxes within a larger group. Figure 4-25 shows two subgroups.

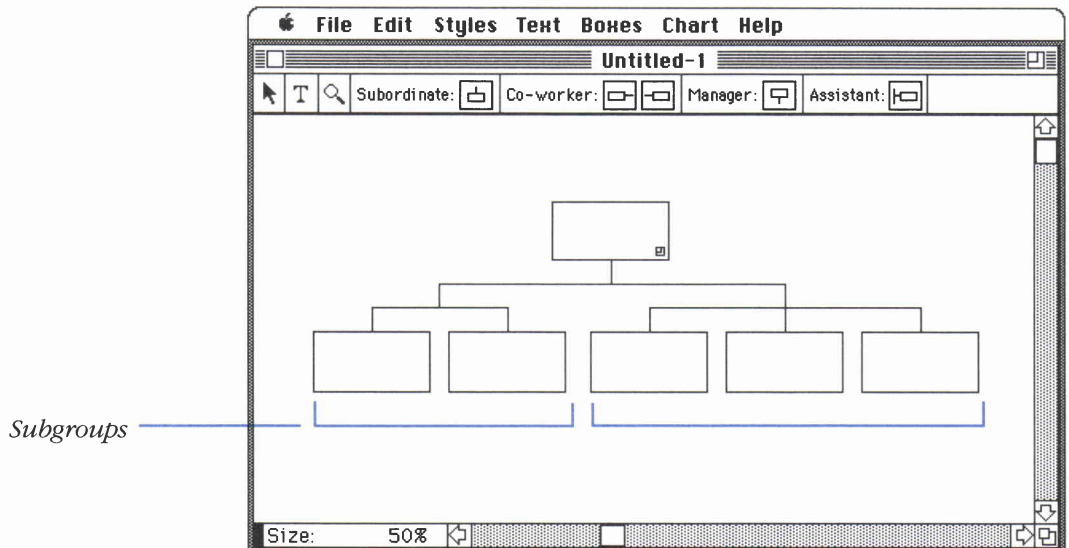


Figure 4-25. Subgroups

The boxes in both subgroups belong to the same group because they have the same manager.

Subgroups can have their own group styles (see Figure 4-26).

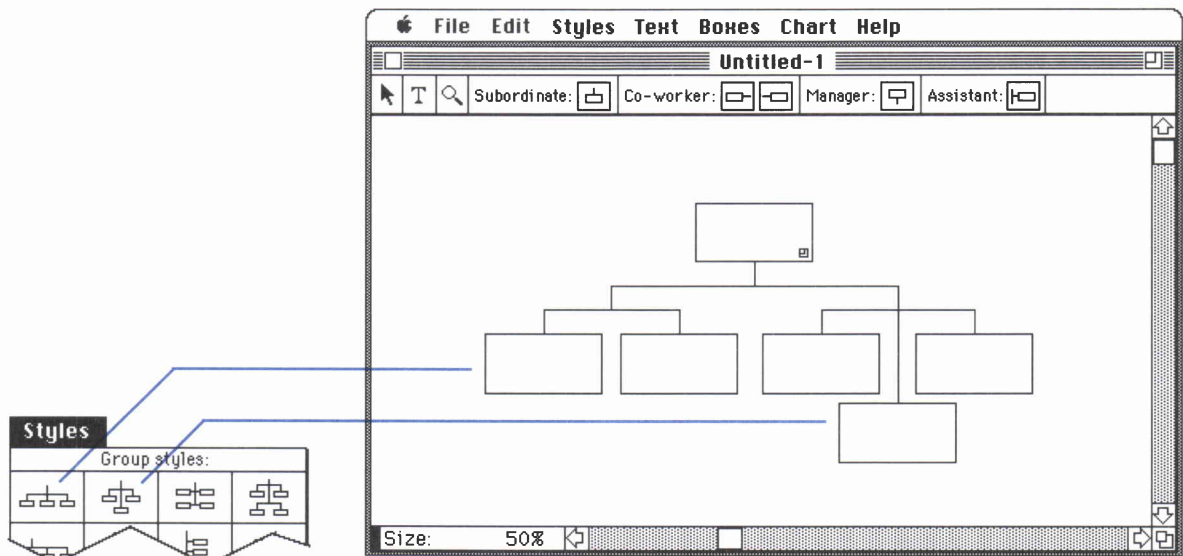


Figure 4-26. Subgroups with different styles

To create a subgroup, select all the boxes that belong to the same subgroup and choose a group style from the Styles menu.

You must put the boxes next to each other before you can make them into a subgroup. They must have the same manager. See “Moving boxes,” page 115 for instructions.

Changing subgroup styles

You change a subgroup’s style in the same way you change the style for a regular group:

Double-click any box in the subgroup to select it, then choose a group style from the Styles menu.

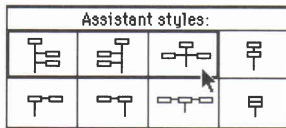
Merging subgroups

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

To merge subgroups into a single group, select all the boxes in all the subgroups that you want to merge, and then choose a group style from the Styles menu.

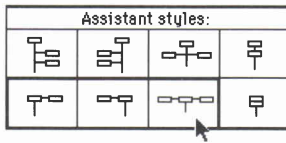
If the subgroups have different managers, you must move the subgroups under the same manager. To put boxes from different groups or subgroups into a single group, see “Gathering scattered boxes under a single manager,” page 117.

Changing assistant styles

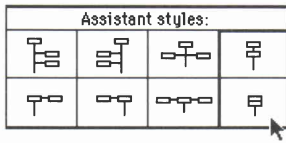


An **assistant** provides administrative assistance, advice, or even managerial assistance to its *manager*. Org Plus provides 8 different ways for you to represent the role of an assistant, available in the Styles menu.

The first three styles (see the figure to the left) are often used to show assistants who provide administrative support, such as secretaries.



The bottom three styles are often used to show assistants who provide advice, such as advisors. You can also use these styles to show a board of directors.



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

When you create an assistant using the Assistant box tool, it is automatically given the preset style for assistants (see note below). You can change this style as follows:

1. **Select the assistant whose style you want to change.**
2. **Decide which style best communicates the role of the assistant (your choice).**
3. **Choose the desired assistant style from the Styles menu.**

You can also apply an assistant style to a non-assistant box. This converts it to an assistant.



Changing the preset option: Starting out, the preset assistant style is the top left one in the set of assistant styles. You can change the preset style. See “Changing preset options,” page 169.

Creating co-managers

Co-managers are boxes who share responsibility for the same group of subordinate boxes (Figure 4-27).

Co-managers share responsibility for the same group of subordinates

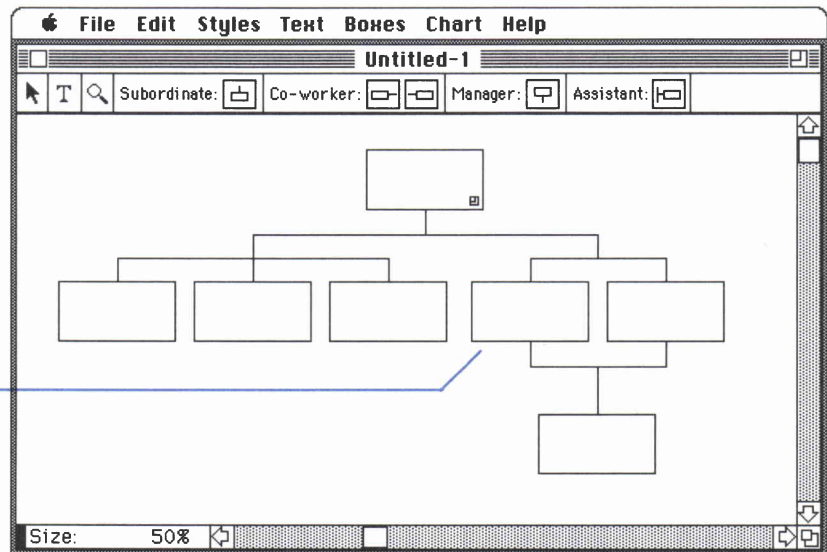


Figure 4-27. Co-managers

Co-manager style:

To show that two or more boxes are co-managers, select the boxes and choose the co-manager style from the Styles menu.

You must move the co-managers next to each other before you can give them the co-manager style. They must have the same manager. See "Moving boxes," page 115 for instructions.

Moving boxes in your chart

To move boxes, you can drag them or cut and paste them.

The following table summarizes the ways you can move boxes. For more complete instructions, turn to the indicated pages:

To do this...	Do this...
Move a manager along with its subordinates	Drag the manager box over its new neighbor, page 115
Move a manager but leave his subordinates where they were	Press and hold the Command key while you drag the manager over its new neighbor, page 116
Gather scattered boxes under a single manager	Cut the boxes you want to move, then paste them onto their new manager, page 117
Replace the contents of one box with the contents of another	Press and hold the Option key while you drag one box over another, page 118
Move the entire chart	Drag the topmost box, page 118
Center the chart	Choose Center Up/Down or Center Left/Right from the Chart menu, page 118

Moving boxes

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

- 1. If you don't have an arrow pointer, click the Selection Arrow tool, located in the top left corner of the window.**
- 2. Decide which box will be the new co-worker or manager of the box or boxes you're moving.**
- 3. Drag the box you want to move over its new co-worker or manager.**

You must attach it to another box in your chart. You can't simply drop it next to another box because Org Plus then doesn't know whether you want it to be a co-worker or subordinate of the box you drop it next to.

Org Plus scrolls the window automatically as you drag, if necessary.

4. **Move the pointer until the arrow points to where you want the box moved:**

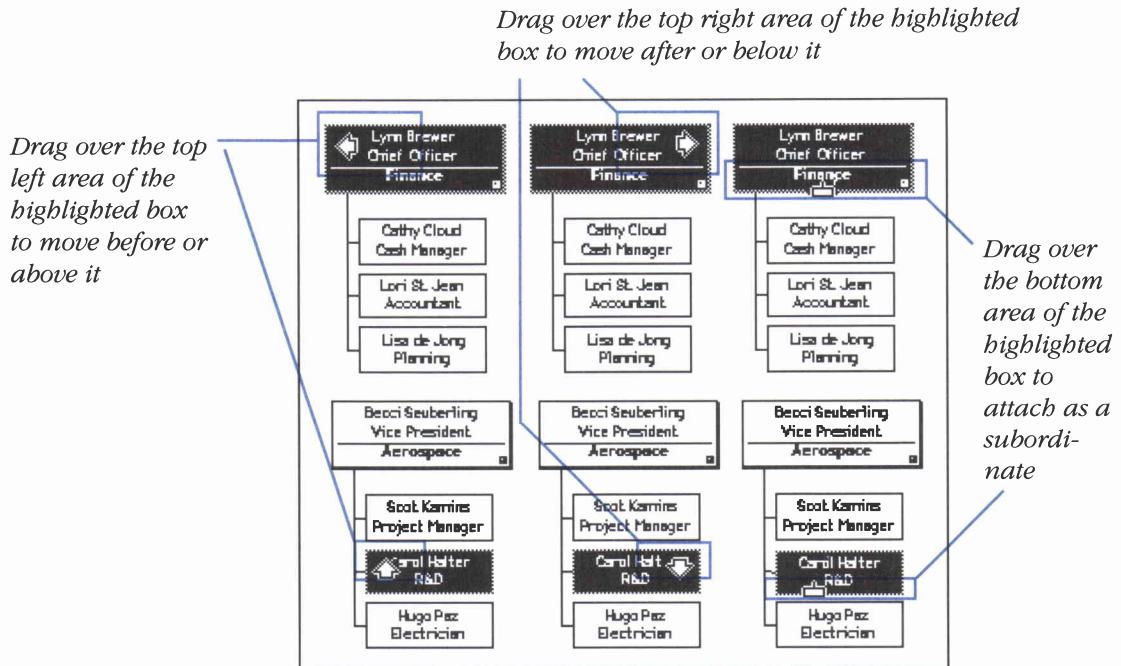



Figure 4-28. Moving boxes

5. **Release the mouse button.**

Org Plus moves the box or boxes and reformats your chart automatically. If you make a mistake or don't like the result, choose Undo from the Edit menu immediately.

 **Moving a box without moving its subordinates:** If you don't want to move the subordinates, press and hold the Command key while you click and drag.

Gathering scattered boxes under a single manager

You can cut and paste to move boxes from one place in your chart to another. This is the most convenient way to gather selected boxes from scattered locations under a single manager.

You can also use this technique to cut or copy boxes from one chart to another. See “Cutting and pasting between charts,” page 145.

The basic steps are:

- 1. If you don't have an arrow pointer, click the Selection Arrow tool, located in the top left corner of the window.**

- 2. Select the box or boxes you want to move.**

To select multiple boxes, either (a) hold down the Shift key then click the boxes you want, or (b) drag an outline around the boxes you want to select, provided the boxes are next to each other. See “Selecting boxes and lines,” page 88.

- 3. Choose Cut from the Edit menu.**

You can also press Command-X.

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

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

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

- 5. Select their new manager's box.**

- 6. Choose Paste from the Edit menu.**

You can also press Command-V.

Individual boxes are pasted as subordinates of the selected box.

Replacing box contents

You can replace all the contents of one box with all the contents of another by pressing and holding the Option key while you drag a box *over* the box whose contents you want to replace. The contents of the original box — the one you drag — are moved, but not the box itself. The box itself is left empty.

Moving and centering your chart

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

To center your chart horizontally between left and right margins, choose Center Left/Right from the Chart menu.

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



Keeping your chart centered: Once you have selected either horizontal or vertical centering, your chart remains that way until you turn centering off or move the topmost box. To turn either type of centering off, choose the centering command a second time.

Changing the distance between boxes

You can change the distance between boxes in all or selected groups at the Spacing dialog box (Figure 4-29).

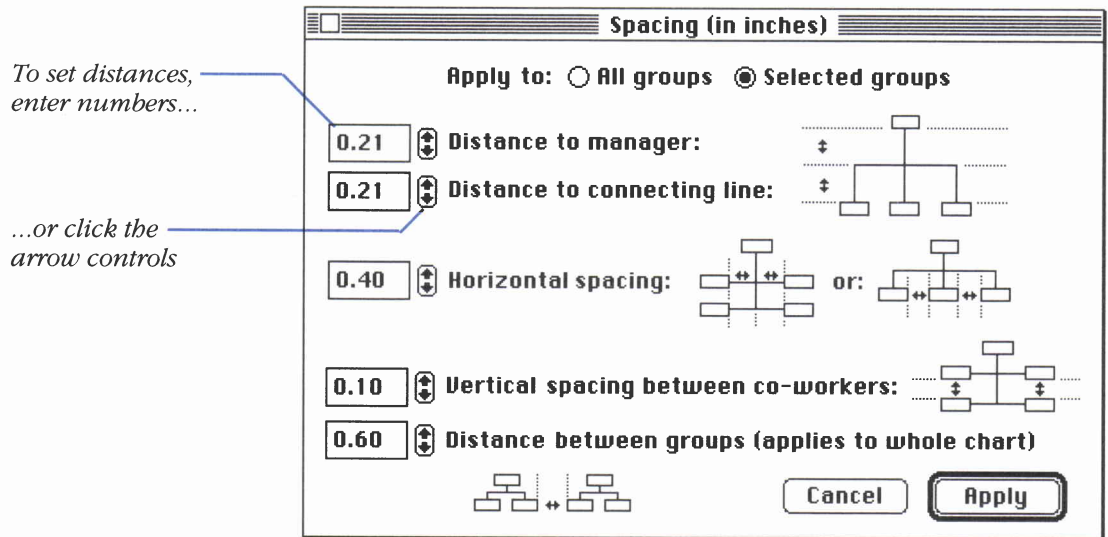


Figure 4-29. The Spacing dialog box

You can also change the distance between boxes in horizontally arranged groups by dragging individual boxes left or right (see “Changing distances by dragging,” page 120).

Using the Spacing dialog box

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

- The distance between boxes in some or all groups
- The distance between some or all groups and their managers
- The distance between all groups in your chart

To change the distance between two individual boxes in a group, see “Changing distances by dragging,” page 120.

Here's how to use the Spacing dialog box:

1. **Select the group or groups whose spacing you want to change.**

The easiest way to select a group is to double-click any box in the group. You can also click one box and press Command-G.



If you don't select any groups, Org Plus assumes you want to change the spacing between boxes in *all* groups in your chart.

2. **Choose Spacing from the Boxes menu.**

The Spacing dialog box appears (Figure 4-29 on page 119).

3. **Type the desired distances in the boxes.**

You can also click the arrow controls to increase or decrease the amounts already shown in the boxes (see Figure 4-29).

4. **To apply the changes and make additional ones, click the Apply button.**

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

If the spacing still isn't quite right, you can repeat these last two steps until you're satisfied.

You can make changes to additional groups by making selections from the Select submenu, entering in the desired distances, and clicking the Apply button.

5. **Click the close box to close the dialog box.**

Changing the length of connecting lines

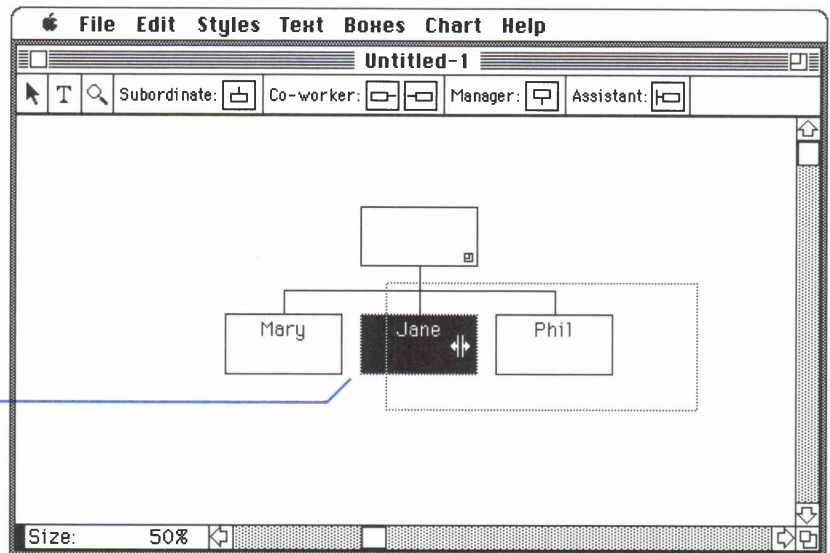
When you change the spacing between boxes as described in the previous section, Org Plus automatically lengthens or shortens their connecting lines. You don't change the length of the lines directly, except by dragging boxes (see immediately below).

Changing distances by dragging

You can change the distance between any group and its manager by holding down the Shift key while you drag any box in the group up or down. This technique is mostly used to make a chart more compact. See "Drag groups down," page 135, for more information.

You can also change the distance between boxes in horizontally arranged groups by holding down the Shift key and dragging individual boxes left or right. For example, to increase the distance between Mary and Jane's boxes in the top part of Figure 4-30, press and hold the Shift key while you drag Jane's box to the right. A dotted rectangle surrounds the boxes that will be moved.

Press and hold the Shift key while you drag Jane to the right



When you release the mouse button, Jane and the boxes to her right are moved

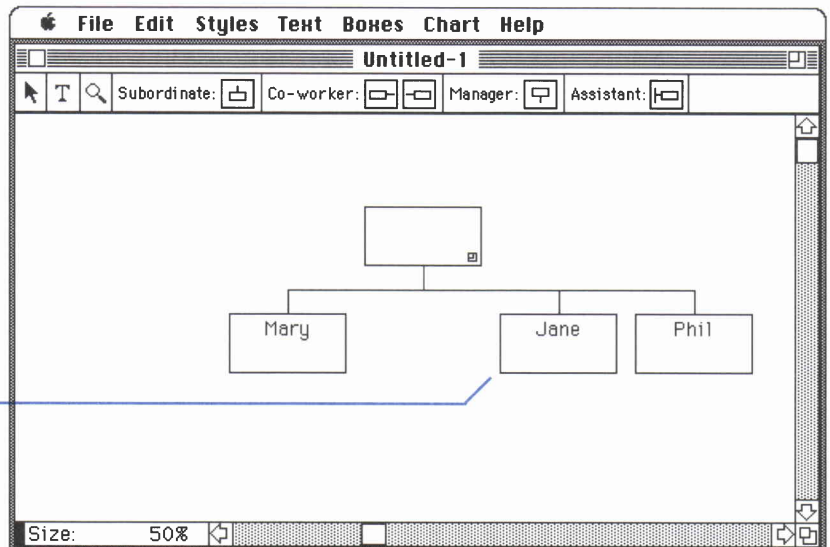


Figure 4-30. Dragging boxes to increase distances

When you release the mouse button, the boxes are moved. Don't worry about boxes overlapping — Org Plus will reformat everything for you.

Making boxes larger or smaller

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

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

The following table summarizes the ways to make boxes larger or smaller. For more complete instructions, turn to the indicated pages:

To do this...	Do this...
Make boxes as narrow as possible	Select the box or boxes which you want to make as narrow as possible, then choose Auto Width from the Boxes menu, page 124
Make boxes as short as possible	Select the box or boxes which you want to make as short as possible, then choose Auto Height from the Boxes menu, page 124
Make boxes as small as possible	Select the box or boxes you want to change and choose the Auto Height and Auto Width commands from the Boxes menu, page 124
Give a box a fixed size	Select the box you want to change, then choose Manual Size from the Boxes menu, page 124
Restore automatic sizing	Select the boxes you want sized automatically, then choose Auto Height and Auto Width from the Boxes menu, page 126

Making boxes as narrow as possible

To make a box as narrow as possible, select the box, then deselect the Auto Width command in the Boxes menu.

If the box doesn't get narrower, then it is already the preset minimum width (1.25"). In this case, choose Manual Size from the Boxes menu and enter a narrower width. See "Giving a box a fixed size," below.

Making boxes as short as possible

To make a box as short as possible, select the box then deselect the Auto Height command in the Boxes menu.

If the box doesn't get shorter, then it is already the preset minimum height (.5"). In this case, choose Manual Size from the Boxes menu and enter a smaller height. See "Giving a box a fixed size," below.

Making boxes as small as possible

To make a box as small as possible, select the box then deselect both the Auto Width and Auto Height commands in the Boxes menu.

If the box doesn't get smaller, then it is already the preset minimum size (1.25" wide by .5" high). In this case, choose Manual Size from the Boxes menu and enter a smaller width and height. See "Giving a box a fixed size," below.



Org Plus doesn't let you make a box smaller than needed to show its information.

Giving a box a fixed size

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

To give a box a fixed size, do the following:

- 1. Select the box or boxes whose size you want to manually set.**
- 2. Choose Manual Size from the Boxes menu.**

Org Plus displays the Manual Size dialog box, shown in Figure 4-31.

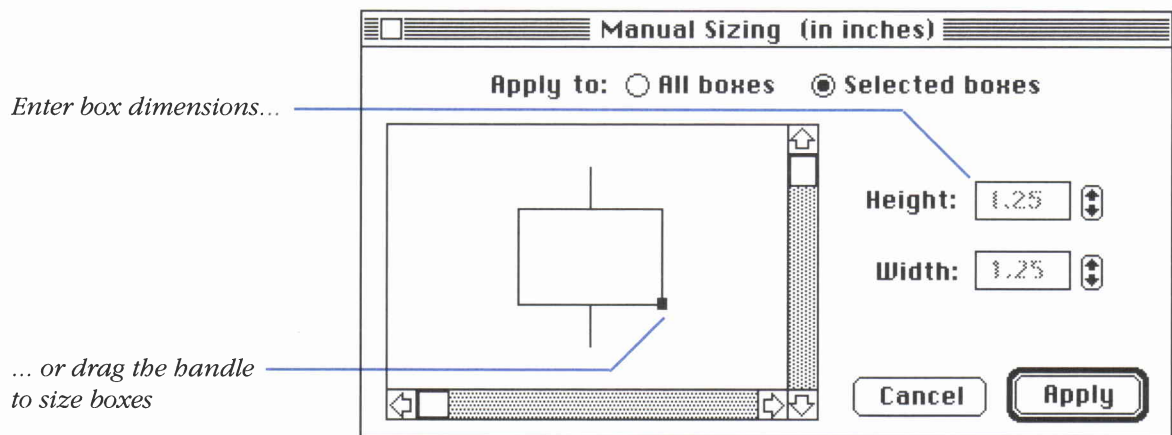


Figure 4-31. The Manual Size dialog box

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

You can also click the arrows next to the boxes to increase or decrease the amounts shown.

You can also drag the corner handle any direction to make the box larger or smaller (see Figure 4-31).

The minimum allowable width is 25". The minimum allowable height is .125". The maximum size is the size of your chart.

4. To apply the changes and make additional ones, click Apply.

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

If the size still isn't quite right, you can repeat steps 3 and 4 until your chart looks the way you want.

You can also select additional boxes by making selections from the Select submenu, entering in the desired sizes, and clicking Apply.

5. Click the close box to close the dialog box.

Restoring automatic sizing

To restore automatic sizing to boxes from which it has been removed, select the boxes and choose both Auto Width and Auto Height from the Boxes menu. There should be a check mark in front of each command when you're done.

Changing text, lines, and box styles

This section describes how you change the appearance of text, lines, and boxes in your chart. The following table summarizes how to do this. For more complete instructions, turn to the indicated pages:

To do this...	Do this...
Change font, style, or size of text	Select the text, then choose a font, style, or size from the Text menu, page 128
Change the alignment of text	Select the text, then choose Left, Right, or Center from the Text menu, page 128
Change the way people's names are formatted	Select the names, then choose a format from the Name submenu in the Text menu, page 129
Change box borders	Select the boxes whose borders you want to change, then choose a border from the Box Border submenu in the Boxes menu, page 132
Change box shadows	Select the boxes whose borders you want to change, then choose a shadow from the Box Shadow submenu in the Boxes menu, page 132
Change connecting line thickness	Select the connecting lines whose thickness you want to change, then choose a thickness from the Line Thickness submenu in the Boxes menu, page 132
Change connecting line style	Select the connecting lines whose style you want to change, then choose a style from the Line Style submenu in the Boxes menu, page 132

Changing text fonts, styles, and sizes

To change the font, style, or size of text, select the text then choose a font, style or size from the Text menu.

You can save time if you first select *all* the text you want to change — everywhere in your chart — *then* chose a font, style, or size:

- To select all the text in a box, click the box once.
- To select all the text in multiple boxes, Shift-click the boxes, or drag an outline around them.

See “Selecting all objects of the same type” for more information, page 90.

To change the font, size, or style of some but not all information in multiple boxes, change the label setup (see “Changing the label setup in order to change text,” page 130).

Changing text alignment

To change the alignment of text, select the text, then choose Left, Right, or Center from the Text menu.

You can save time if you first select *all* the text whose alignment you want to change —everywhere in your chart — *then* choose Left, Right, or Center:

- To select all the text in a box, click the box once.
- To select all the text in multiple boxes, Shift-click the boxes, or drag an outline around them.

See “Selecting all objects of the same type” for more information, page 90.

To change the alignment of some but not all text in multiple boxes, change the label setup (see “Changing the label setup in order to change text,” page 130).

Wrapping text across lines

Most information in your chart, such as names or titles, is usually kept together on a single line. Some information, such as a job description or general comments, may look better if **wrapped** — or split — across multiple lines, as shown in Figure 4-32.

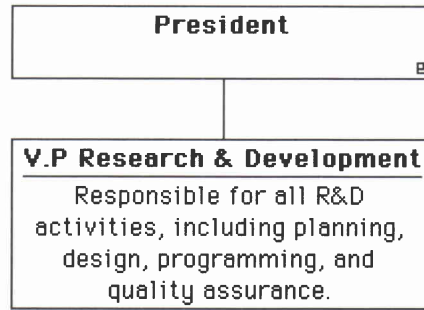


Figure 4-32. Wrapping long text items across lines

To wrap text, select the text, then choose Word Wrap from the Text menu.

You can save time if you first select *all* the text items you want to wrap, *then* wrap them:

- To wrap *all* the text in a box, click the box once, then choose Word Wrap.
- To wrap *all* the text in multiple boxes, press and hold the Shift key while you click the boxes, or drag an outline around them, then choose Word Wrap.

To wrap some but not all information in multiple boxes, change the label setup (see “Changing the label setup in order to change text,” page 130).

Moving text

You can move text in boxes by moving labels in the Label Setup dialog box. See “Moving labels,” page 102, for more information.

Changing people's name formats

To change the format of *all* the people's names in your chart, press Command-A to select all the boxes, then choose a desired name format from the Name submenu, located in the Text menu.

To change the format of the people's names in *some* boxes, select the boxes whose names you want to reformat, then choose a desired name format from the Name submenu, located in the Text menu.

Changing the label setup in order to change text



You can use the Label Setup dialog box to change the font, size, style, alignment, and wrapping behavior of the information in the boxes of your chart. Whatever you do to a label, Org Plus does to the information in your chart.

For example, the figure to the left shows the label setup for the boxes in Figure 4-33.

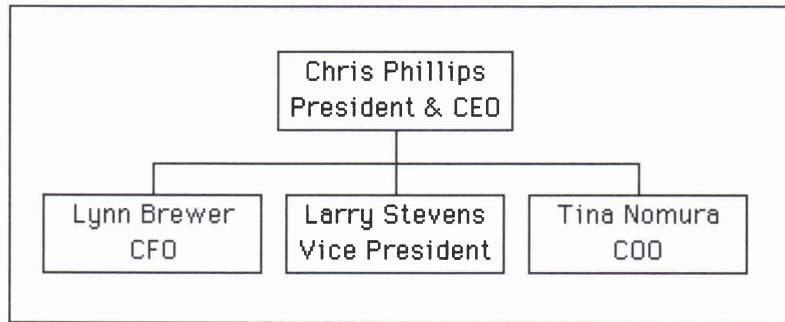


Figure 4-33. Before changing the label setup



Make the Title label bold and italics, as shown in the figure to the left, and all of the titles in the chart are changed accordingly (see Figure 4-34).

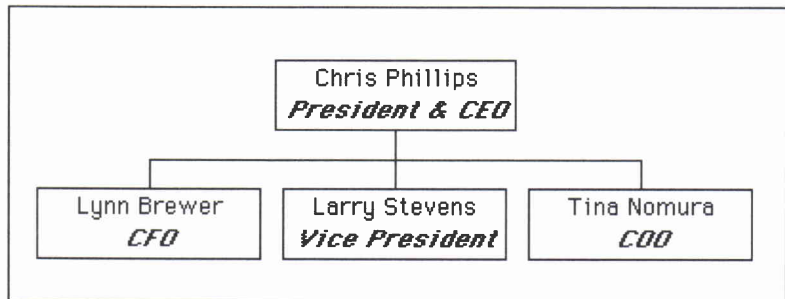


Figure 4-34. After changing the label setup

To change the characteristics of selected information in your chart, do the following:

1. **Select the boxes whose information you want to change.**
2. **Choose Label Setup from the Edit menu.**

The Label Setup dialog box appears (Figure 4-35).

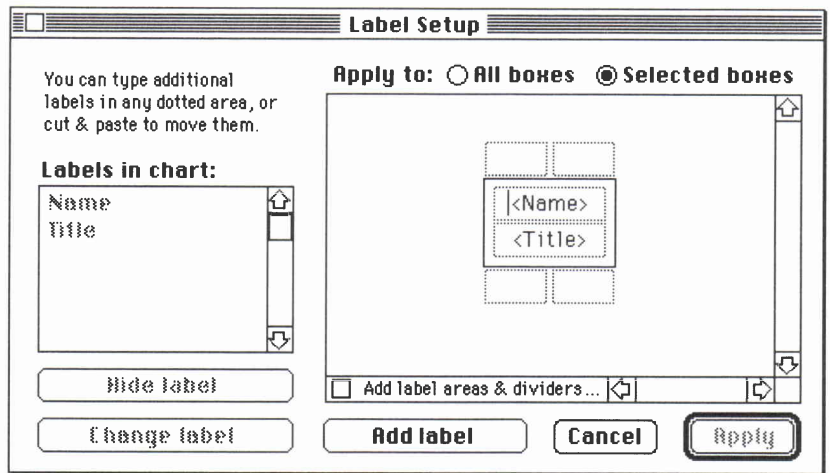


Figure 4-35. The Label Setup dialog box

The Label Setup dialog box shows the labels that have been created for your chart.

For more information about the Label Setup dialog box, see “The Label Setup dialog box,” page 98.

3. **Click the label for the information you want to change.**
4. **Make the appropriate choices from the Text menu.**

You can change the font, size, or style of the information.

You can choose Left, Right, or Center to change the alignment of the information.

You can choose Word Wrap to change the wrapping behavior of the information.

5. **Click the Apply button.**

The change is made to the information in all selected boxes.

6. **Click the close box to close the dialog box.**

For more information about things you can do at the Label Setup dialog box, see “Changing the label setup,” page 96.

Changing box borders and shadows

You can choose from among 12 box border styles and 8 shadow styles.

To change the border or shadow style for boxes in your chart, select the box or boxes whose border or shadow style you want to change and choose the style you want from the Box Border or Box Shadow submenu in the Boxes menu.

A **hairline** border is drawn with the finest line your printer is capable of drawing. It appears thicker on your computer screen than it will when it's printed.

For more information about box border and shadow styles, see "Box Border," page 194, and "Box Shadow," page 195.

Changing line thickness and style

Connecting lines connect the boxes in your chart.

To change their thickness or pattern, select the lines you want to change and choose a line thickness or style from the Line Thickness or Line Style submenu in the Boxes menu.

Making your chart more compact

This section describes techniques you can use to make your chart more compact. If all else fails, you can reduce your chart on a laser printer or a copier. Org Plus's Make Fit command tells you exactly how much you need to reduce it to make it fit on letter size paper.

Keep in mind that virtually everything you do has an effect on either the width or height of your chart. With a few exceptions, changes that make your chart shorter make it wider, while changes that make it narrower make it taller. The goal is to find the optimum set of changes which produce the most compact chart.

The table on the opposite page summarizes the things you can do to reduce the size of your chart, and the effect they have on your chart's height or width. Refer to the indicated pages for more information.

To do this...

Make your chart narrower

Make your chart shorter

Make your chart narrower *and*
shorter

Do this...

Use a vertical group style,
page 134

Offset groups beneath their
manager, page 134

Increase the distance between a
group and its manager, page 135

Wrap comments or other long
text values page 136

Abbreviate names, page 136

Use a horizontal group style,
page 137

Rearrange information within
boxes, page 137

Use smaller font sizes, page 138

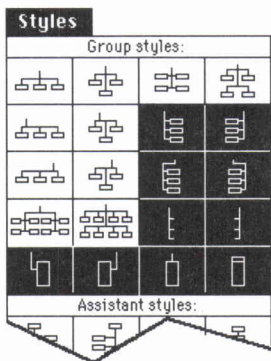
Use minimum chart margins,
page 144

Reduce spacing between boxes,
page 138

Use the Make Fit command,
page 139

Making your chart narrower

Use vertical group styles



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

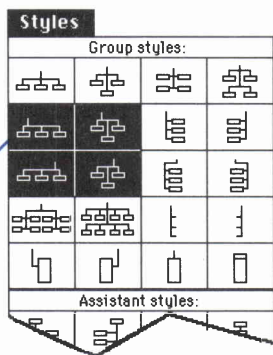
In general, you get the most compact chart by using horizontal styles for groups at the top of your chart, and vertical chart styles for groups at the bottom of your chart.

The figure to the left highlights the narrowest group styles. The narrowest styles are the two list styles, indicated by the arrow.

To change group styles, double-click any box in the groups whose style you want to change, then choose a narrow style from the Styles menu. See “Changing group styles,” page 111 for more information.

Start with groups at the bottom of your chart and work your way up, using the narrowest vertical styles at the bottom, and wider, horizontal ones at the top.

Offset groups beneath their manager



In some cases, you can shift a horizontally arranged group of subordinates to save space. The four styles highlighted in the figure to the left show the offsetting group styles. Figure 4-36 shows the effect of using one of these styles.

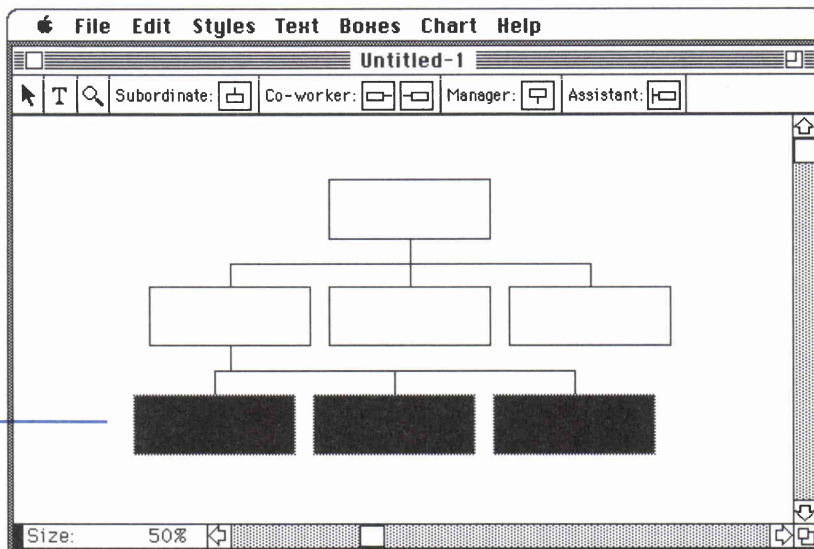


Figure 4-36. Offsetting a group

To change the offset of a horizontal group beneath its manager, double-click any box in the group and choose the appropriate style from the Styles menu.

Drag groups down

You can sometimes make a dramatic difference in the width of your chart if you increase the distance between a group and its manager.

Figure 4-37 shows the difference this technique can make. In the bottom chart, the highlighted groups have been dragged down to get a more compact chart.

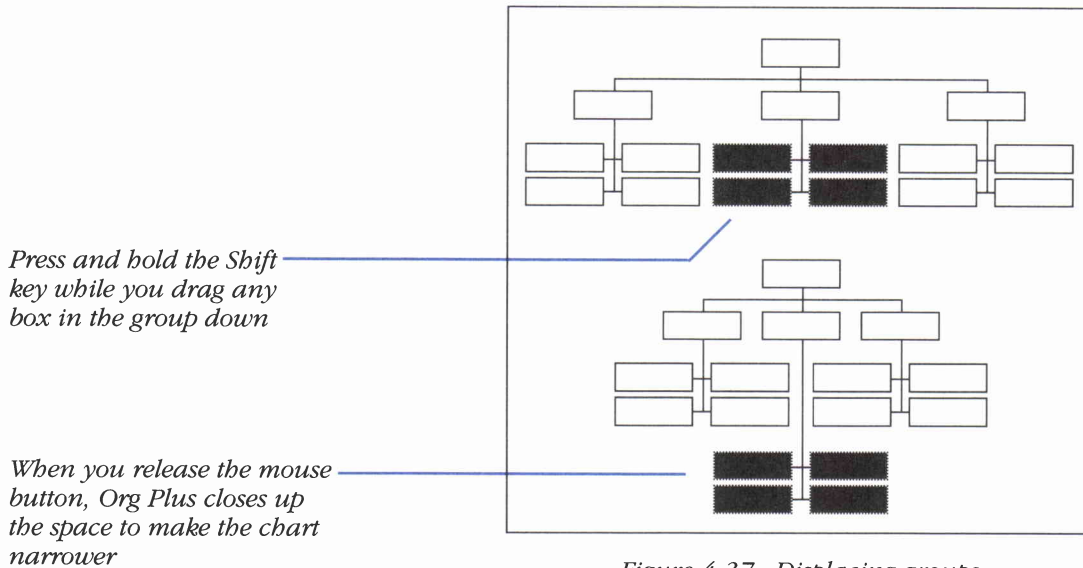


Figure 4-37. Displacing groups

To increase the distance between a group and its manager:

1. **Press and hold the Shift key while you drag any member of the group downwards.**
2. **Release the mouse button to see the effect of the move.**
3. **Repeat steps 1 and 2 as many times as desired in order to get the maximum compactness.**



This technique can make your chart more compact but it also makes the reporting relationships somewhat harder to see. It can also give an inaccurate sense of status.

Wrap text

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

For information about how to wrap text, see “Wrapping text across lines,” page 128. See also “Using the Make Fit command,” page 139.

Abbreviate names and titles

Abbreviate all information that doesn’t need to be spelled out. This can significantly reduce the width of your chart, as shown in Figure 4-38.

*Abbreviating names
can make your chart
much narrower*

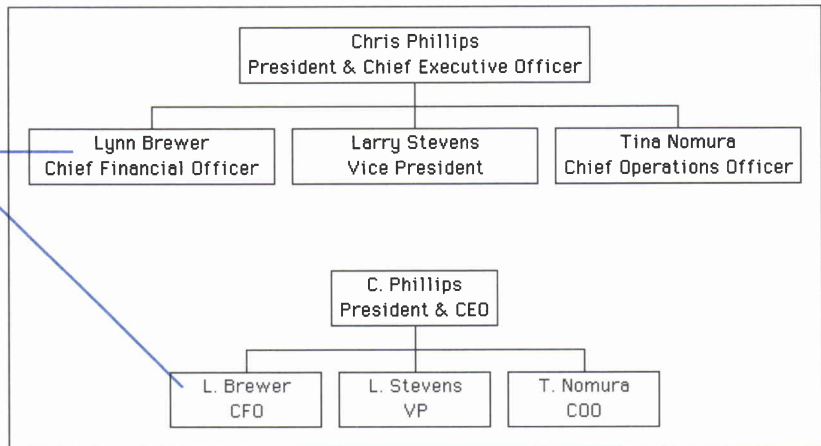


Figure 4-38. Abbreviating names and titles

To abbreviate names, select the boxes whose names you want to abbreviate, then choose a style of abbreviation from the Names submenu, located in the Text menu. See “Formatting people’s names,” page 108, for more information. See also “Using the Make Fit command,” page 139.

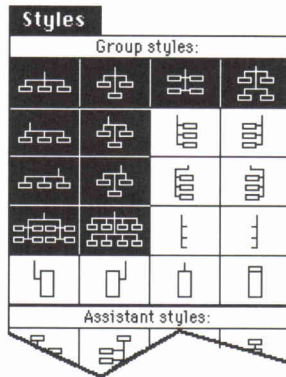
Org Plus doesn’t automatically abbreviate other kinds of information. You must do this manually.

Making your chart shorter

Your choice of group styles has a major effect on the height of your chart.

Use horizontal group styles

You can make your chart shorter by using the shorter (but wider) group styles.



The figure to the left highlights the shortest group styles. The shortest is the standard horizontal style — the top left style in the menu.

To change group styles, double-click any box in the group whose style you want to change, then choose a wider style from the Styles menu. See “Changing group styles,” page 111 for more information.

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

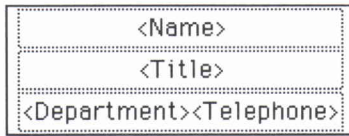
Making your chart narrower and shorter

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

Rearrange information

You can rearrange information in and outside a box to make your chart narrower or shorter, depending on your need.

To make a chart shorter, arrange information horizontally. To make a chart narrower, arrange information vertically. See Figure 4-39 on page 138.



Stack labels in the label setup to make the chart narrower

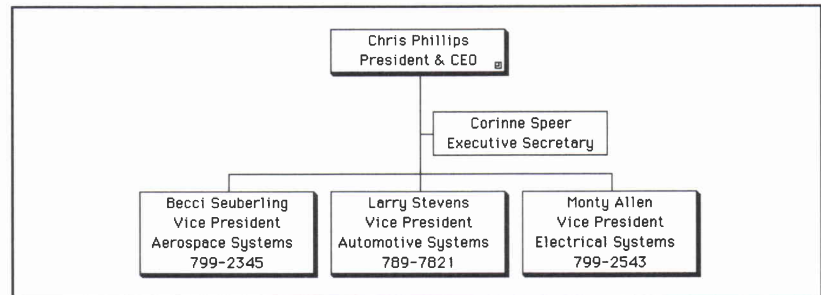
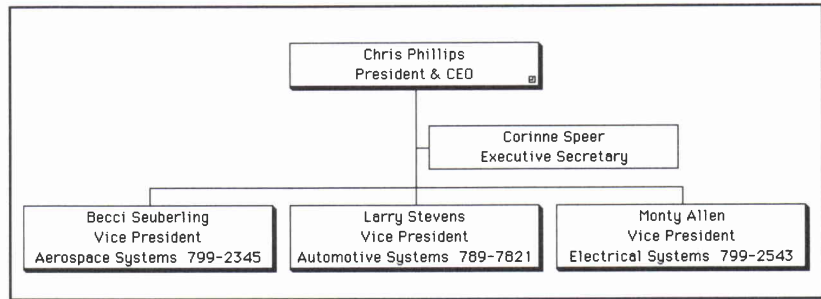
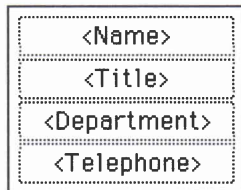


Figure 4-39. Rearranging information

To make a chart both narrower and shorter, avoid placing information outside the boxes in your chart.

You can rearrange the information by rearranging the labels in the Label Setup dialog box. See “Changing the label setup,” page 96.

Use smaller fonts

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

To make your text smaller, select the boxes whose text you want to reduce, then choose a smaller size from the Text menu.

See also “Using the Make Fit command,” page 139.

Reduce spacing between boxes

You can reduce the amount of space between boxes at the Spacing dialog box. See “Changing the distance between boxes,” page 119, for instructions.

Using the Make Fit command

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

To use the Make Fit command, do the following:

1. **Choose Make Fit from the Chart menu.**

Org Plus opens the Make Fit dialog box (Figure 4-40).

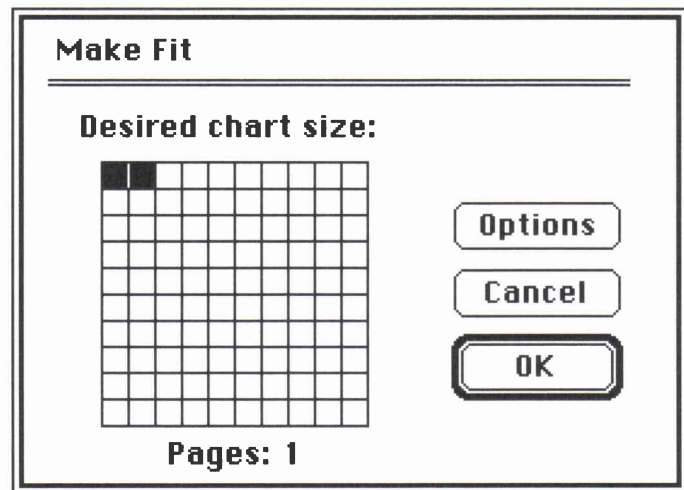


Figure 4-40. The Make Fit dialog box

The grid shows a maximum chart area of 10 pages by 10 pages. Each square represents a page. The pages currently occupied by your chart are shown by black squares. Figure 4-40 shows how the Make Fit dialog box would appear for a chart which spans two pages.

2. **Click in the square that indicates where you want the lower right corner of your chart to be.**

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

3. To select space-saving options, click the Options button.

See “Changing the Make Fit Options” later in this section for more information.

4. Click OK to make your chart fit.

If Org Plus can't make your chart fit in the desired number of pages, you'll see one of the alert boxes shown in Figure 4-41.

You can make your chart fit by reducing it to the size shown here at the Page Setup dialog box (see Figure 4-42)

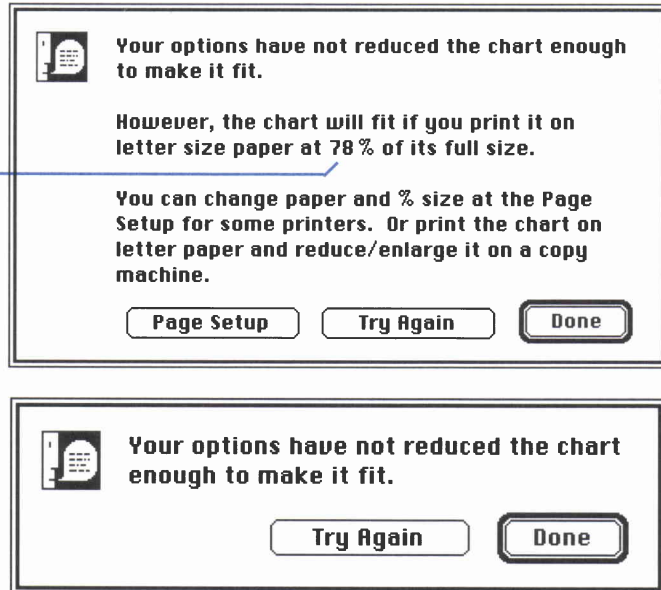


Figure 4-41. Make Fit message boxes

If you see the first alert box, you can:


- Click the Page Setup button to change the reduction amount at the Page Setup dialog box (see “Reducing to fit,” page 141), **OR...**
- Click the Try Again button to return to the Make Fit dialog box and change the Make Fit Options (see “Selecting the Make Fit Options,” page 142), **OR...**
- Click the Done button to exit the Make Fit command

If your chart has to be reduced to less than 25% of its actual size in order to fit, you'll see the second alert box in Figure 4-41. From this alert box you can:

- Click the Try Again button to return to the Make Fit dialog box and change the Make Fit Options (see “Selecting the Make Fit Options,” page 142), **OR...**
- Click the Done button to exit the Make Fit command

Reducing to fit

With some printers, as on some copiers, it is possible to “photo-reduce” a document in order to make it fit in a smaller space. On these printers, you reduce the document *before* you print it (see “Reducing on a printer,” later in this section). On the copiers, you reduce the document *after* you print it (see “Reducing on a copy machine,” later in this section). In either case, it is helpful to know the precise percentage you need to reduce it in order to make it fit. The Make Fit alert message (Figure 4-41) tells you this.

 *Reducing to less than 50% of actual size can make your text unreadable:* Depending on the fonts in your chart, reducing to less than 50% of its actual size may make the text too small to read. In any event, the Macintosh won't reduce a document to less than 25% of actual size. Org Plus displays the second alert box in Figure 4-41 if more reduction than that is necessary to make it fit.

Reducing on a printer

If your printer can print reduced images, you can specify the amount of reduction at the Page Setup dialog box (see Figure 4-42).

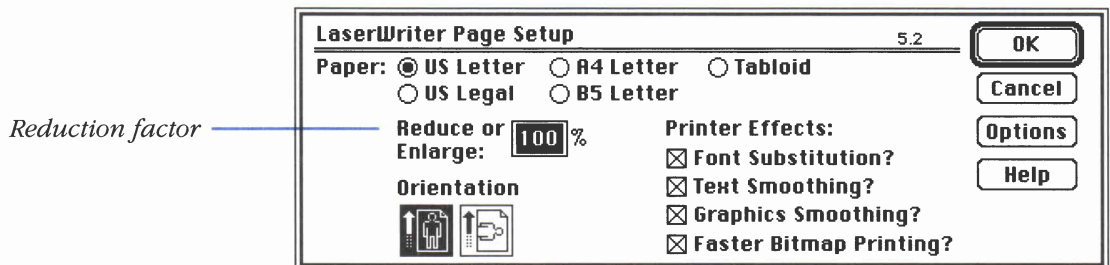


Figure 4-42. Reducing to fit

Click the Page Setup button in the Make Fit alert box (Figure 4-41) and type the number Org Plus showed in the alert message into the Reduce or Enlarge text box in the Page Setup dialog box. Then click the OK button in the Page Setup dialog box.



In order to compute the amount of reduction, Org Plus assumes you're printing on letter size paper. If you aren't, the amount of reduction shown won't be correct. To make your chart fit, use a different reduction amount, or select letter size paper at the Page Setup dialog box, then type in the reduction amount supplied by Org Plus. Then print on letter size paper.

Reducing on a copy machine

If your printer can't print reduced images, you won't see the Reduce or Enlarge text box in the Page Setup dialog box (see Figure 4-42). Nevertheless, you can print your chart, paste it together, and *then* reduce it on a copy machine. If possible, set your copy machine to reduce to the amount shown in the Make Fit alert box.

Selecting the Make Fit Options

To select the Make Fit Options, click the Options button in the Make Fit dialog box (Figure 4-40). The Make Fit Options dialog box appears (Figure 4-43).

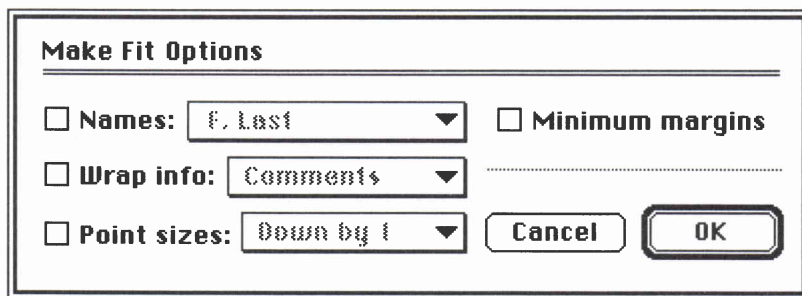


Figure 4-43. The Make Fit Options dialog box

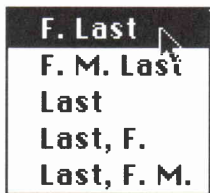
Starting out, none of the Make Fit options are in effect. You can select them, as described below. Org Plus does what you select here when you press the OK button at the Make Fit dialog box.

Abbreviating names

You can make your chart significantly smaller by abbreviating people's names.

To abbreviate people's names, do the following:

1. **Select the Names check box.**
2. **Position the arrow pointer over the Names pop-up menu bar (see Figure 4-43).**
3. **Press and hold the mouse button while you make a choice from the pop-up menu, as shown in the figure to the left.**



When you release the mouse button, your choice appears in the pop-up menu bar.



This feature affects only the label that has been marked for automatic name formatting. See "Formatting people's names," page 108, for more information.

Wrapping text

You can make a chart much narrower (but taller) by **wrapping** text. Wrapped text flows from one line to the next, as does the text in this paragraph. Many people don't want information such as names to wrap. But some information, such as a job description or comments, often looks better that way.

To wrap some or all of the information in your chart, do the following:

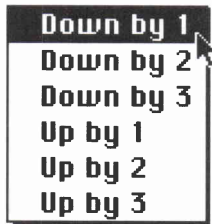
1. **Select the Wrap info check box.**
2. **Position the arrow pointer over the Wrap info pop-up menu bar (see Figure 4-43).**
3. **Press and hold the mouse button while you make a choice from the pop-up menu, as shown in the figure to the left.**



When you release the mouse button, your choice appears in the pop-up menu bar.

See "Wrapping text across lines," page 128, for more information about wrapping.

Using smaller fonts



To make all the text in your chart larger or smaller, do the following:

1. **Select the Point sizes check box.**
2. **Position the arrow pointer over the Point sizes pop-up menu bar (see Figure 4-43 on page 142).**
3. **Press and hold the mouse button while you make a choice from the pop-up menu.**

When you release the mouse button, your choice appears in the pop-up menu bar.

Many fonts are available in the following sizes: 9, 10, 12, 14, 18, and so on. If you choose Down by 1, all text is resized to the next smallest available point size. For example, 18 point text is made 14 point, 14 point text is made 12 point, and so on. Text with the smallest available point size is reduced by the number in the menu command. For example, if you choose Down by 2 and 9 point is the smallest available size, 9 point text will be reduced to 7 points.

Minimum margins

Click this item in the Make Fit Options dialog box (Figure 4-43 on page 142) to set the margins to the minimum permissible on the chosen printer. Org Plus will only use minimum margins if it makes your chart fit in the desired number of pages. Minimum margins are the non-printing area on laser printers such as the LaserWriter, and at least 1/8th inch on the ImageWriter and other printers, depending on the printer.

Working with multiple charts

You can cut and paste to copy or move boxes from one chart to another. You can also cut and paste to split larger charts into multiple smaller charts, or merge smaller charts into single, larger charts.

If you're creating charts for a large organization, you can create a basic chart stationery for your organization, then create a book of charts.

The following table summarizes these procedures. For more complete instructions, turn to the indicated pages:

To do this...	Do this...
Transfer boxes from one chart to another	Cut boxes from one chart and paste them onto their manager in another chart, page 145
Merge smaller charts into a single, larger one, or break larger charts into several smaller ones	Cut and paste branches from one chart to another, page 145
Create a book of charts	Create and use Org Plus stationery, page 148

Cutting and pasting between charts

To move boxes — including entire branches — from one chart to another, do the following:

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

To select an entire branch, click the topmost box in the branch, then choose Branch from the Select submenu, located in the Edit menu. You can also press Command-B.

2. Choose Cut or Copy from the Edit menu.

The selected boxes, including their information and their labels, are copied to the Clipboard (a temporary storage place in your computer).

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

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

4. Click the new manager for the boxes on the Clipboard.

5. Choose Paste from the Edit menu.

Boxes are pasted as *subordinates* of the selected manager.

If the labels in one chart do not match the labels in the other chart, the Match Information dialog box appears. See “Matching labels in different charts,” immediately below, for instructions.

Matching labels in different charts

The Match Information dialog box (Figure 4-44) lets you match the labels for the information on the Clipboard with the labels in the chart you’re pasting to.

*Labels in the chart
you are pasting into*

*Labels for the boxes on
the Clipboard -- the
ones you are pasting*

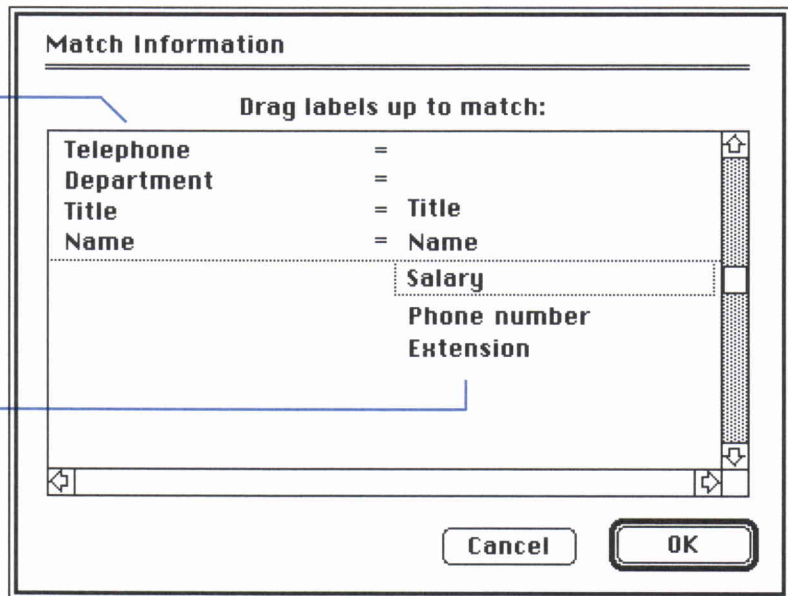


Figure 4-44. The Match Information dialog box

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

In the example (Figure 4-44), both charts have Name and Title, but the chart has Telephone while the Clipboard has Phone Number. In addition, the Clipboard has Salary and Extension, while the chart has Department.

To match the labels, drag each label up until it is opposite its equivalent label, then click OK.

Figure 4-45 below shows how you could match up the labels shown in Figure 4-44 on page 146.

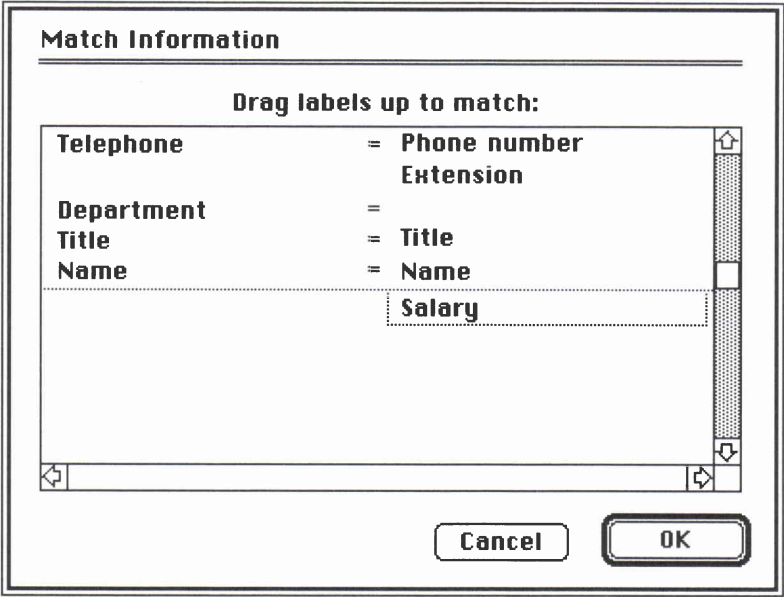


Figure 4-45. After matching labels

In the example, you would drag Phone Number up opposite Telephone.

On Clipboard:

Tom Jones
794-6850
x1125

After pasting:

Tom Jones
794-6850 x1125

You can drag multiple labels up so that they are opposite a single label. In Figure 4-45, Phone number and Extension have been dragged up opposite Telephone. The telephone and extension numbers, which are separate in the Clipboard's boxes, will be joined together when pasted, as shown in the figure to the left.

To paste information that doesn't have an equivalent label, such as Salary in the example, you must first create an equivalent label in the chart you're pasting to. See "Creating labels," page 100, for instructions.

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

Creating books of charts

A **book of charts** is a set of separate charts which, as a whole, present the entire organization. Typically, each chart fits comfortably within a single page and depicts a separate department or division of the organization. Each chart in the book has the same basic design. You create the basic design once and save it as chart stationery. Each department or division uses the stationery when they need to create a chart. The stationery helps ensure a common look to all the charts created for your organization.

A book of charts is an effective and practical way to present a very large organization.

To create a book of charts, do the following:

- 1. Create a stationery chart for your organization.**

See "Creating your own stationery," page 167.

- 2. Create new charts for your organization using your new stationery.**

See "Opening stationery," page 168.

You're free to modify each chart as needed. Using stationery simply helps you preserve a basic uniformity among all your charts.

- 3. Save each chart under a different name.**

To print a book of charts, select the charts at the Finder, then choose Print from the File menu.

Before printing and distributing a book of charts, you might want to devise a scheme for sequencing and numbering the charts. As with any book, your book of charts might have a table of contents, or an index.

Special effects through showing and hiding

You can produce special effects by selectively showing or hiding boxes and branches in your chart. You can also preview your chart as it will appear when printed by hiding all non-printing screen elements.

The following table summarizes how to get these special effects. For more complete instructions, turn to the indicated pages:

To do this...	Do this...
Create custom group styles	Create a hidden manager box, page 149
Show one group while hiding others	Hide the branches you don't want in your chart, page 150
Preview your chart as it will appear when printed	Hide branch symbols, page 203, and page lines, page 152

Showing/hiding boxes

You can create and then hide a box in order to create special group styles. Some sample styles created by this technique are shown in Figure 4-46 on page 150.

To hide a box, select the box you want to hide and then choose Hide Box from the Boxes menu.

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

To show a hidden box, click it, or drag a rectangle around the general area where you know it's located, and then choose Show Box from the Boxes menu.

Blue boxes show the location of some of the hidden boxes

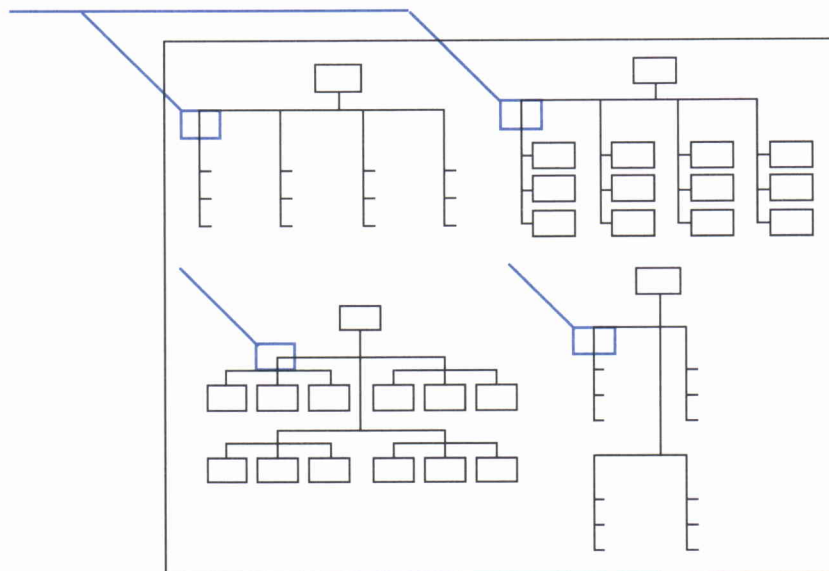


Figure 4-46. Sample group styles created by means of hidden boxes

Showing/hiding branches

You can show or hide any branch in your chart. Figure 4-47 shows a chart with all branches hidden except Tina Nomura's. You can hide all the branches except the ones you're interested in. This makes it easier to focus on them. Hiding branches can also save you time. See "Time saving measures" on page 212.

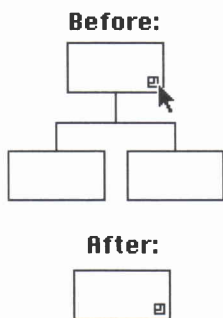
To hide a branch, select the topmost box in the branch and then choose Hide Branch from the Boxes menu.

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

To show a hidden branch, select the topmost box in the branch and then choose Show Branch from the Boxes menu.

You can also click the branch symbol in the lower right corner of the topmost box, as shown in the figure to the left. If the branch symbol isn't visible, choose Show Symbols from the Chart menu.

Click the branch symbol once to hide the branch, a second time to show it again.



Showing/hiding page lines

Page lines give you additional information about your chart.

To show or hide page lines, choose **Show (or Hide) Page Lines** from the **Chart** menu.

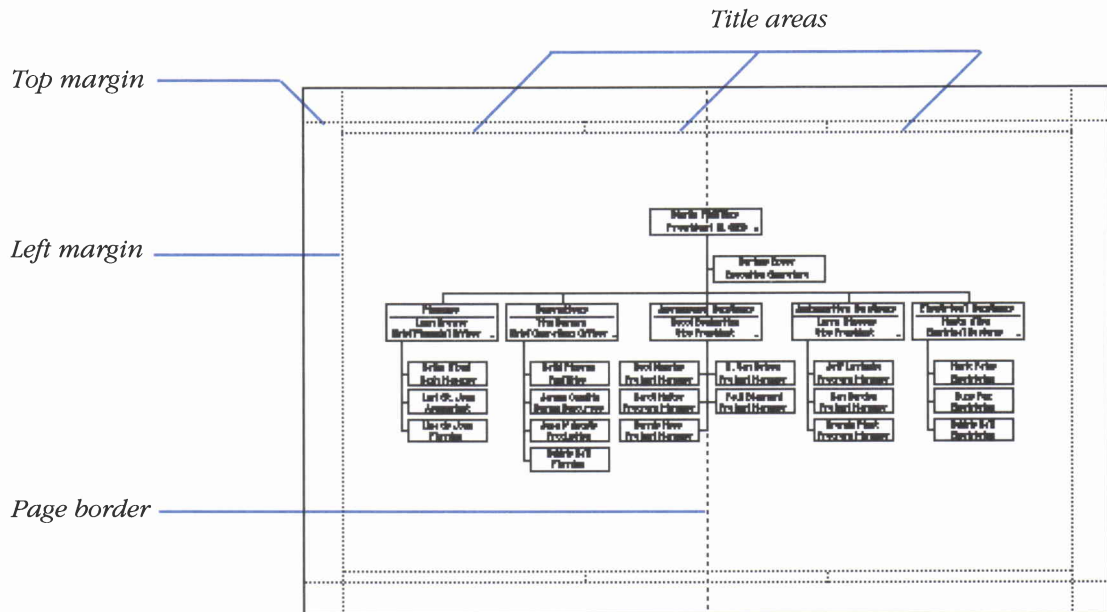


Figure 4-48. Page lines

Margin lines appear around the outer edges of the **chart page area**. You can drag them to change the margins. See “Changing your chart margins,” page 172.

Title area lines show special areas where you can type chart titles. See “Creating titles,” page 162.

Page border lines show you where your chart crosses pages. They also show you at a glance how many pages are needed to print your chart.

Previewing your chart

Hide page lines (and symbols) for a true preview of your chart as it will appear when printed. Even when they are shown, however, page lines and branch symbols are never printed — they only appear on your computer screen.

Special effects through manual drawing

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

The following table lists some of the special effects you might want to create. You might think of additional ones, as well. For complete instructions, turn to the indicated pages:

To do this...	Do this...
Draw a border around your chart	Use the Rectangle tool, page 155
Draw a rectangle around a group of boxes	Use the Rectangle tool, page 155
Draw lines to separate groups of boxes in your chart	Use the Perpendicular Line tool, page 156
Draw lines to point to things in your chart	Use the Diagonal Line tool, page 157
Draw connecting lines between two boxes in separate groups (to show “dotted line” relationships)	Use the Connecting Line tool, page 158

Displaying the drawing tools

Starting out, the drawing tools are not displayed along with the other tools. They should only be used for creating special effects like those described in this section.

To show the drawing tools, choose Show Draw Tools from the Chart menu. The drawing tools appear in the upper right corner of your window (see Figure 4-49).

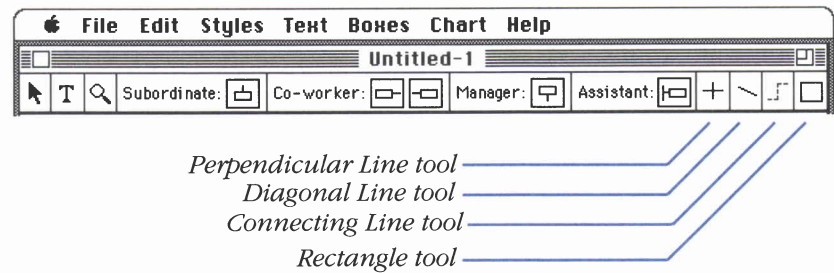


Figure 4-49. The special drawing tools

To hide the tools when you're finished with them, choose Hide Draw Tools from the Chart menu.

About the drawing tools

Imagine that there is a transparency lying on top of your chart. When you hand-draw objects with the special drawing tools, you draw them on this transparency, *not* on the chart itself. To the eye, there is only one drawing, but you really have *two* drawings: your chart, which is drawn automatically by Org Plus, and a second, transparent overlay containing your hand-drawn objects.

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

You can move your hand-drawn objects if necessary, but you can avoid the overlapping problem if you always use the special drawing tools as *the last step before printing your chart*.

Using the Rectangle tool

The Rectangle tool lets you draw rectangles (boxes) that are not drawn automatically by Org Plus. The rectangles you create with the Rectangle tool are transparent — you can see what is underneath them.

Figure 4-50 shows a couple special effects you can create with the Rectangle tool.

Draw a border around your chart

Draw a rectangle around a special group

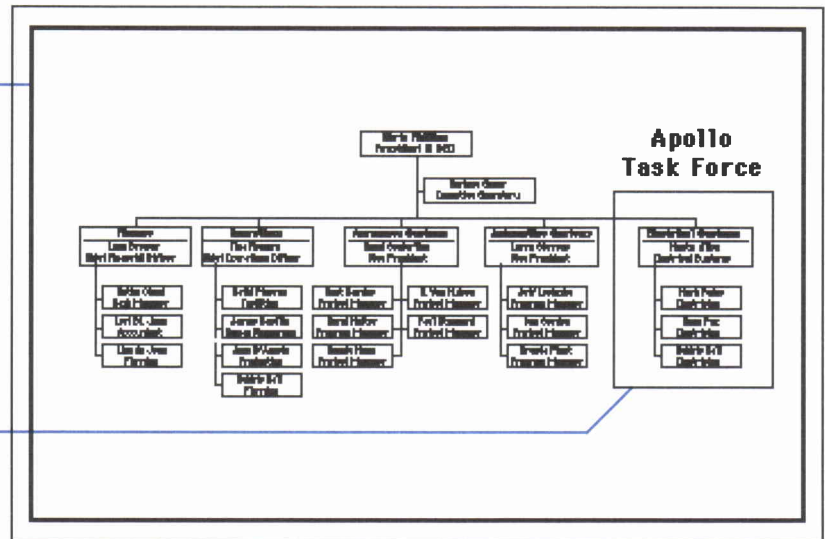
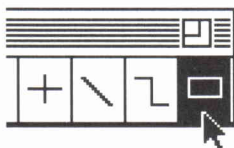


Figure 4-50. Creating extra boxes

You can draw rectangles anywhere in your chart:

1. **Choose Show Draw Tools from the Chart menu to display the draw tools.**



2. **Click the Rectangle tool, as shown in the figure to the left.**

Your pointer changes to a crosshair (like a plus sign).

3. **Position the pointer over the exact place where you want the top left corner of the rectangle to appear.**
4. **Press and hold the mouse button while you drag to the opposite corner of the rectangle, then release the mouse button.**

Org Plus draws the rectangle.

You can change the border or shadow of any rectangle by selecting the rectangle, then choosing a border or shadow from the Box Border or Box Shadow submenus, located in the Boxes menu. You can also change the line style of the rectangle by selecting the rectangle and choosing a style from the Line Style submenu, also located in the Boxes menu.

For more information about box border and shadow styles, see “Box Border,” page 194, and “Box Shadow,” page 195.

For more information about line styles, see “Line Style,” page 196.



To select a rectangle, you must click on the rectangle border.

Using the Perpendicular Line tool

The Perpendicular Line tool lets you draw vertical or horizontal lines that are not drawn automatically by Org Plus. Figure 4-51 shows a sample of how you can draw extra horizontal lines and text to make your chart clearer to people.

Draw extra lines to clarify groupings of boxes

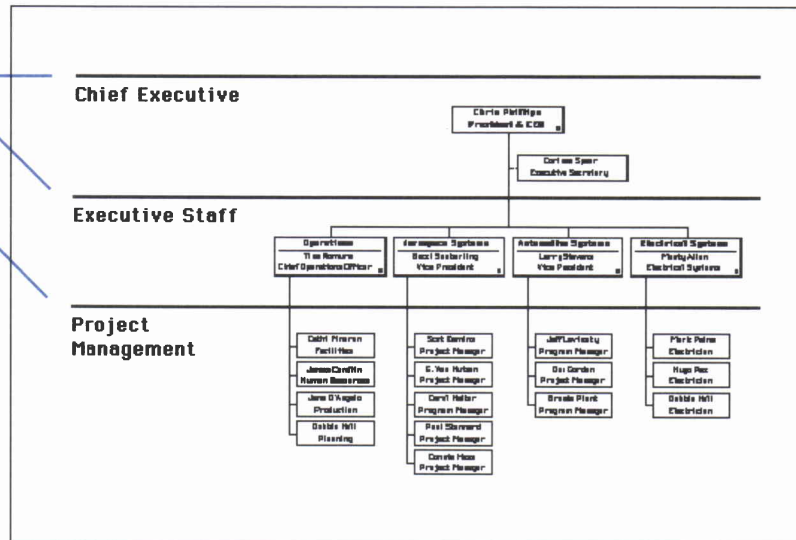
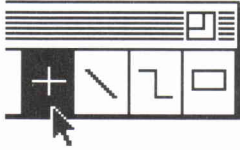


Figure 4-51. Using extra lines and text

See “Annotating your chart,” page 161, for information about creating extra text, as shown in Figure 4-51.

To draw a vertical or horizontal line, do the following:



1. **Choose Show Draw Tools from the Chart menu to display the draw tools.**

2. **Click the Perpendicular Line tool, as shown in the figure to the left.**

The pointer changes to a crosshair (like a plus sign).

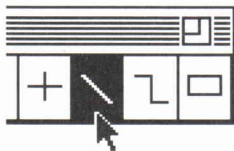
3. **Position the pointer over the exact place where you want the line to begin.**

4. **Press and hold the mouse button while you drag to where the line should end, then release the mouse button.**

Drag up or down to create a vertical line; left or right to create a horizontal line.

You can change the thickness and style of any line by selecting the line, then choosing a line thickness or style from the Line Thickness or Line Style submenus, located in the Boxes menu.

Using the Diagonal Line tool



1. **Choose Show Draw Tools from the Chart menu to display the draw tools.**

2. **Click the Diagonal Line tool, as shown in the figure to the left.**

The pointer changes to a crosshair (like a plus sign).

3. **Position the pointer over the exact place where you want the line to begin.**

4. **Press and hold the mouse button while you drag to where the line should end, then release the mouse button.**

You can change the thickness and style of any line by selecting the line, then choosing a line thickness or style from the Line Thickness or Line Style submenus, located in the Boxes menu.

Using the Connecting Line tool

Use the Connecting Line tool to draw a connecting line between any two boxes in your chart. You might do this to show a dotted line relationship, as shown in Figure 4-52.

Draw connecting lines to show special reporting relationships

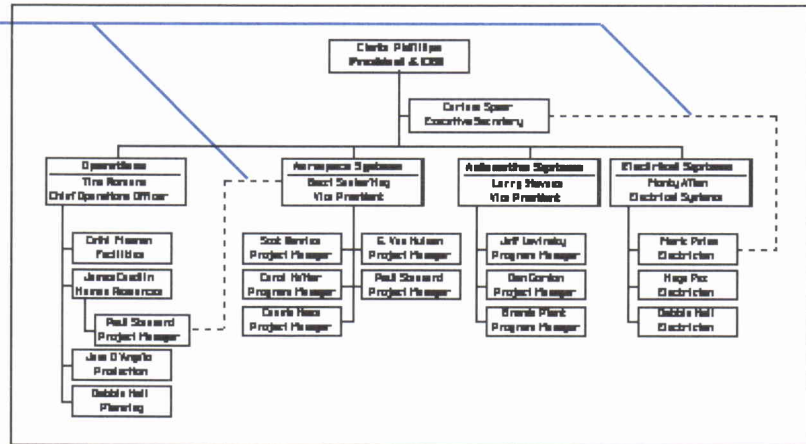
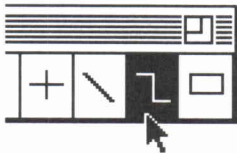


Figure 4-52. Dotted line relationships

In general, you should rearrange your chart to position boxes with connecting lines as close to each other as possible. This makes your chart look less complicated, and reduces the chance the lines and boxes will overlap. See “Rearranging boxes in your chart,” page 110, and “Moving boxes,” page 115, for more information.

1. **Choose Show Draw Tools from the Chart menu to display the draw tools.**
2. **Click the Connecting Line tool, as shown in the figure to the left.**
3. **Position the pointer over the edge of the box from which the line should extend.**
4. **Press and hold the mouse button while you drag the pointer over the edge of the box you want to connect the first box to, then release the mouse button.**



The Connecting Line tool can draw lines with a maximum of three angles. This is enough to connect any two sides of any two boxes in your chart.

Adjusting connecting lines

You may need to adjust connecting lines to prevent them from overlapping boxes in your chart. Overlapping may occur when you first create the line, or after Org Plus redraws the underlying chart.



You can only adjust connecting lines that have three or more segments.

To adjust a connecting line with three or more segments, do the following (see the example in Figure 4-53):

1. **Position the pointer over the line segment which needs adjusting.**

You can't adjust the lines which come out of a box.

2. **Press and hold the mouse button while you drag the line segment left/right or up/down.**

The direction in which you can drag depends on whether the line is vertical or horizontal. In Figure 4-53, the line is vertical, so you can drag left or right.

3. **Release the mouse button.**

Drag line left or right to reposition it

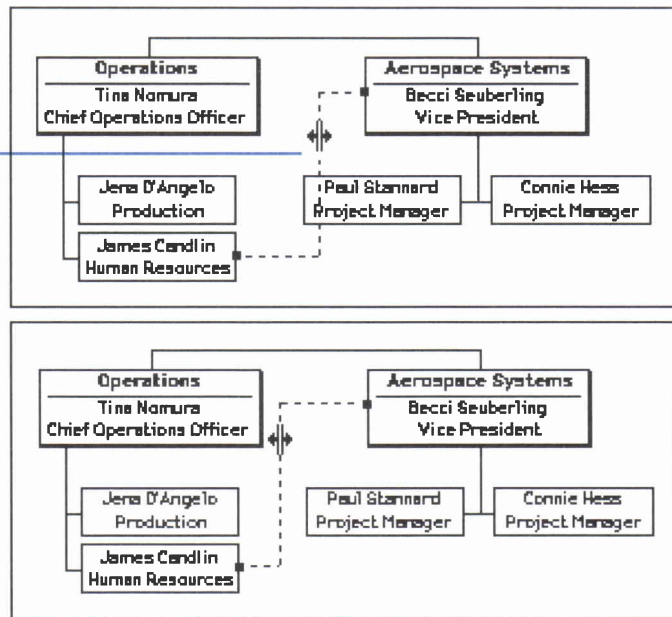
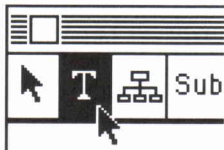


Figure 4-53. Dragging a connecting line

You can change the thickness and style of any line drawn with the Connecting Line tool. Select the line, then choose a line thickness or style from the Line Thickness or Line Style submenus, located in the Boxes menu.

Annotating your chart



Annotations are extra text that you add to your chart to make it clearer to the people who look at it. To create annotations, use Org Plus's Text tool, located in the upper left corner of the chart window (see figure to the left).

The following table summarizes the techniques you can use to annotate your chart. For more complete instructions, turn to the indicated pages:

You can put annotations anywhere on your chart using the Text tool. You should enter titles in the special **title areas**.

To do this...

Create standard titles

Create miscellaneous annotations such as explanatory captions

Draw boxes around text annotations

Do this...

Enter text in the title areas, page 162

Use the Text tool, page 163

Select the text and choose a box border or shadow, page 164

Creating titles

Title areas appear within dotted lines below the top margin and above the bottom margin, as pictured in Figure 4-54. If the dotted lines do not appear in your chart, choose Show Page Lines from the Chart menu.

Top left, center, and right title areas

Bottom left, center, and right title areas

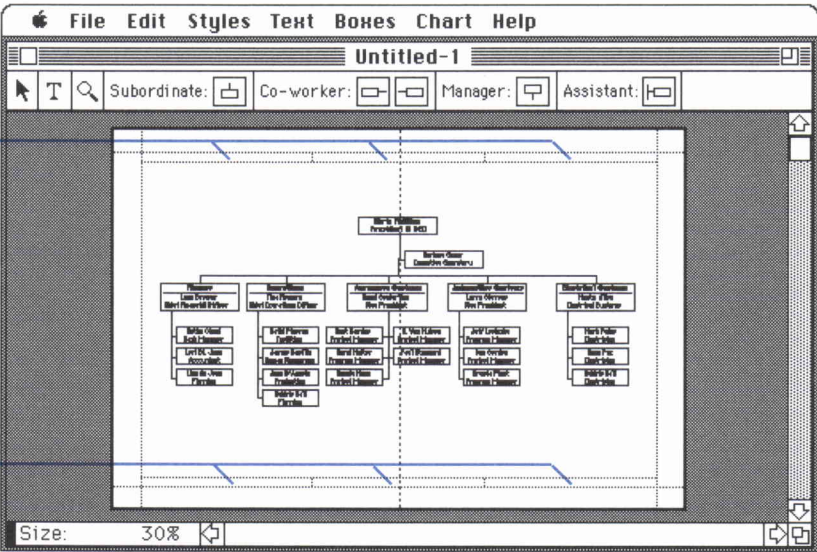


Figure 4-54. Title areas

There are six title areas:

- Top left
- Top center
- Top right
- Bottom left
- Bottom center
- Bottom right

To enter text into any title area, do the following:

1. **Choose Show Page Lines from the Chart menu.**
2. **Click in the area where you want to type.**

Org Plus automatically aligns titles to the left in the top left and bottom left areas; aligns titles to the right in the top right and bottom right title areas; and centers titles in the top center and bottom center title areas. You can change a title's alignment by

clicking in the title area and choosing Left, Right, or Center from the Text menu.

You can apply any font, size, or style to text in title areas.

Why use title areas?

Although you can enter text anywhere in your chart (as explained in “Creating annotations,” below), the title areas are special:

- Title areas expand and contract as your chart expands and contracts; so the location of the titles relative to your chart always remains the same.
- Title areas and the chart never overlap, no matter what you do.

Creating annotations

You can place annotations anywhere in your chart: click the Text tool, then click where you want to type and start typing.

When you click off of the annotation, handles appear at all four corners of the area occupied by the annotation. You can resize that area by dragging the handles. See “Resizing annotation areas,” immediately below. You can also draw a box around that area. See “Drawing boxes around annotations,” page 164.

■ Authorized by: John Smith ■

You can apply any font, size, or style to any annotation.



Always create annotations as the last step before printing your chart: Imagine that there is a transparency lying on top of your chart. When you type text in any area *other than* the title areas and the boxes of the chart, you are typing onto this transparency. If Org Plus has to redraw your chart, the location of the annotation you type relative to the rest of the chart may be different. You can avoid this problem altogether if you always enter annotations as *the last step before printing your chart*.

Resizing annotation areas

To resize an annotation area:

1. **Click the Selection Arrow tool in the upper left corner of the window.**
2. **Click anywhere on the annotation area you want to resize.**

Handles appear at the four corners of the annotation area.

3. **Drag the handles to resize the annotation area.**

You can make the annotation area larger or smaller. Org Plus rearranges the annotation to make it fit in the annotation area.

Drawing boxes around annotations

To draw a box around an annotation area:

1. **Click the Selection Arrow tool in the upper left corner of the window.**
2. **Click the annotation you want to draw a box around.**
3. **Choose a box border from the Box Border submenu, located in the Boxes menu.**

Org Plus draws a box around the selected annotation area.

You can also choose box shadows from the Box Shadow submenu, or a line style from the Line Style submenu, both located in the Boxes menu.

For more information about box border and shadow styles, see “Box Border,” page 194, and “Box Shadow,” page 195.

For more information about line styles, see “Line Style,” page 196.

Pasting pictures into your chart

You can paste PICT formatted pictures anywhere in your chart. PICT is a special graphic format used by many Macintosh applications. You must first create the pictures using one of those applications.

1. Copy the picture to the Clipboard in the other application.

See the manual for the application in which you create the picture.

2. Open the chart you want to paste the picture into.

3. Click in the exact place where you want the picture to appear.

4. Choose Paste from the Edit menu.

The picture is pasted onto the chart. You can then drag it wherever you want it.

Printing your chart

Use the standard Macintosh Print command to print your charts.

The following table summarizes the various printing options:

To do this...	Do this...
Print the current chart from within the application	Choose Print from the File menu and click the OK button
Print a chart from within the Finder	Select the icon for your chart and choose Print from the File menu
Print multiple charts from within the Finder	Select the icons for your charts and choose Print from the File menu

See the section on printing in your Macintosh owner's manual for detailed instructions.

Customizing Org Plus

You can create stationery to make a basic chart for you or your organization. This ensures a common look to all your charts while minimizing the work you need to do when creating them.

You can also change Org Plus's preset options to suit your own needs.

Creating your own stationery

Stationery is a special type of chart containing the basic design and settings used routinely by you or your company. Stationery is like a pad of preprinted charts with empty boxes. When you open a stationery chart, you “tear off” a standard chart from the pad. You type in information that is unique to your new chart without having to redo the elements that are standard to all charts. Then you save the filled-in chart with its own name.

Some predesigned stationery has been included on your System disk.

To create your own stationery, do the following:

1. **Choose New from the File menu.**
2. **Change the label setup for the topmost box in your chart.**

See “Changing the label setup,” page 96, for instructions.

All other boxes that you create will then have the same setup.

3. **Create a standard chart.**

Create a template organization. Figure 4-55 on page 168 shows an example.

Do not enter information in the boxes of the chart.

4. **Add pictures, text, and other elements that are common to all the charts that you intend to create.**
5. **Change the margins, dialog box settings, and menu settings to those you like to use.**
6. **Choose Save Stationery from the File menu.**

Changing preset options

Preset options are the initial menu and dialog settings used by Org Plus when you start the application or open a chart. You can see what they are by pulling down the menus and opening the dialog boxes when nothing in your chart is selected. For example, click in the background of your chart to deselect anything that may be selected, then pull down the Text menu. Check marks appear next to the preset point size and alignment commands. Choose Page Setup from the File menu to open the Page Setup dialog box — you'll see the preset paper, orientation, and so forth.

You can change the preset options for all charts you may create in the future, or change them for the current chart only. This section tells you how.

Changing the preset options for new charts

To change the preset options for charts you may create in the future, do the following:

1. **Open the application.**
2. **Choose Preferences from the Edit menu.**

The Preferences dialog box appears. See Figure 4-56 on page 171.

If you want to change the preset chart margins, first set the margins to the desired sizes in the current chart, then choose Preferences. (See “Changing your chart margins,” page 172, for instructions.)

3. **Change the options in the Preferences dialog box.**

See, “The Preferences dialog box,” page 170, for details.

4. **Open, change, and close the dialog boxes whose preset options you want to change.**

Dialog boxes appear when you choose a menu command that has three trailing dots (for example: “Page Setup...” in the File menu).

5. **Choose the menu commands you want to preset.**

For example, to change the preset group style, choose the group style you want from the Styles menu.



To change the preset type font, size, and style for information in your chart's boxes, choose Label Setup from the Edit menu, select the labels whose font, size, and style you want to change, then choose commands from the Text menu.

6. Click the OK button in the Preferences dialog box.

Changing the preset options for existing charts

To change the preset options for a chart that has already been created, do the following:

- 1. Open the application.**
- 2. Open the chart whose preset options you want to change.**
- 3. Click on the background of the chart to deselect anything that may be selected.**
- 4. Choose the menu commands you want to preset.**

You can change the preset Styles and Text menu commands only. Preset Text settings affect annotations and text in the edit panel only.

Your choices are stored with your chart when you save it, and are used the next time you open it.

The Preference dialog box

In addition to changing dialog box and menu options, you can change three chart-wide options in the Preferences dialog box, as shown in Figure 4-56.

The “unit of measurement” determines whether margins or box dimensions are measured in inches or in centimeters. See “Changing your chart margins,” page 172, and “Giving a box a fixed size,” page 124.

The “overlap between chart pages” setting determines how much overlap — or duplication of your chart — appears at the edges of the pages when your chart is printed, as illustrated in Figure 4-57.

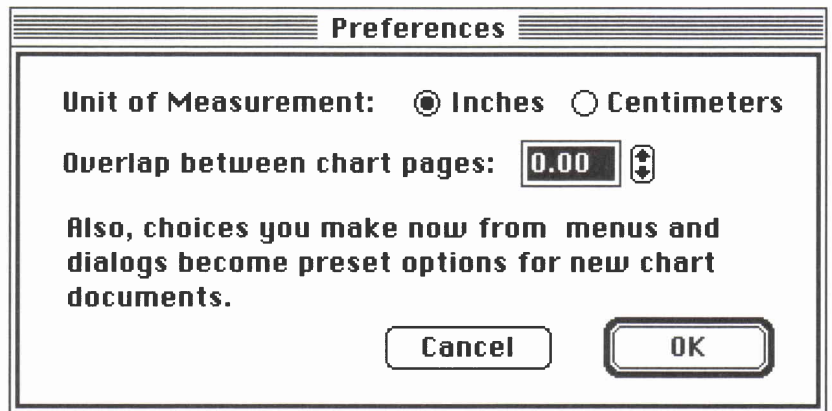


Figure 4-56. The Preferences dialog box

Overlap printing makes it easier to tape together a chart printed on multiple pages. It is valid only when your chart spans multiple pages. If your chart spans multiple pages horizontally, Org Plus duplicates the right edge of one page on the left edge of the following page. If your chart spans multiple pages vertically, Org Plus duplicates the bottom edge of the upper page on the upper edge of the lower page. The overlap amount is the same in both directions. The number 0.00 indicates that there is no overlap printing. Figure 4-57 shows about an inch of overlap printing.

Overlap area is printed on both pages to help you paste charts together afterwards

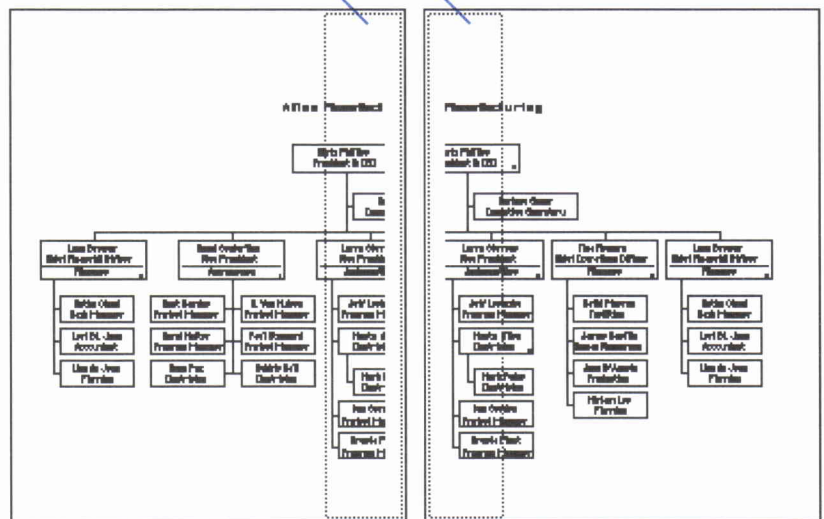


Figure 4-57. Overlap printing

Changing your chart margins

Org Plus's preset margins are set to an absolute minimum in order to permit drawing on as much of the page as possible.

In general, you probably won't need to change these margins; but if you do, here's how:

1. **Choose Size to Window from the Chart menu.**

This step is optional. It allows you to see *all* the margins at the same time. However, you can see portions of the margins and still change them.

2. **If the margin lines aren't visible, choose Show Page Lines from the Chart menu.**

You have to make page lines visible in order to see and change the margins.

3. **Click and drag any margin line to where you want it.**

There are four margin lines, one for each margin, as pictured in Figure 4-58. When you move the pointer over any of these lines, the pointer changes automatically to show you the direction in which you can drag. As you drag, Org Plus shows the actual width of the margin.

Drag the margin lines to set margins

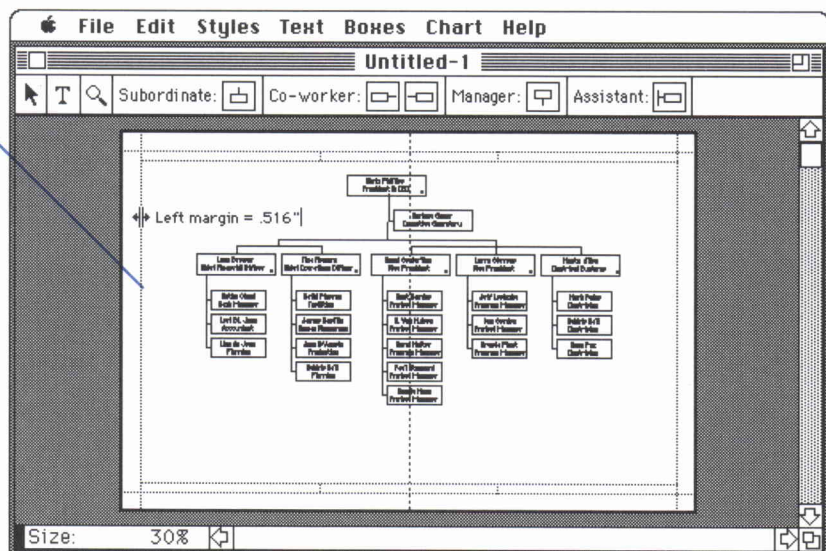


Figure 4-58. Changing margin lines



If you own a laser printer. Laser printers can't print within .25" (roughly) of any edge of the paper. This is a limitation of the printer hardware, not of the application. That unprintable border determines the minimum margin for Org Plus charts.

Chapter 5: Reference

This chapter provides a description of every icon, control, and menu command in Org Plus — everything you see while you're using the program.

For step-by-step instructions on how to do basic chart operations, see Chapter 4, "Using Org Plus," page 73.

The Chart window

The Chart window appears when you create a new chart or open an existing one (Figure 5-1). You can open up to 16 charts at one time, depending on how much memory your system has, and how many other non-Org Plus windows are open.

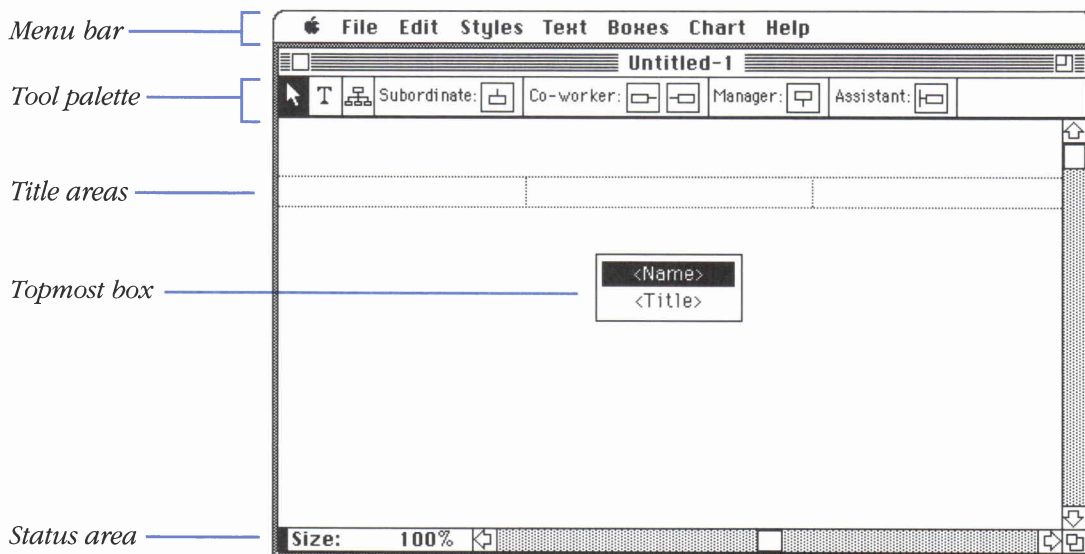


Figure 5-1. The Chart window for a new chart

The menu bar and the tool palette contain all the commands and tools you need to create and update your charts.

You can enter chart titles in the title areas.

The status area, located in the lower left corner of your window, ordinarily shows the current level of chart magnification. In Figure 5-1, the chart is shown at actual size — the size it will appear when printed.

The other controls you see are standard Macintosh items. See your Macintosh owner's manual for more information.

The tool palette

The tool palette contains tools that you use to change your chart.

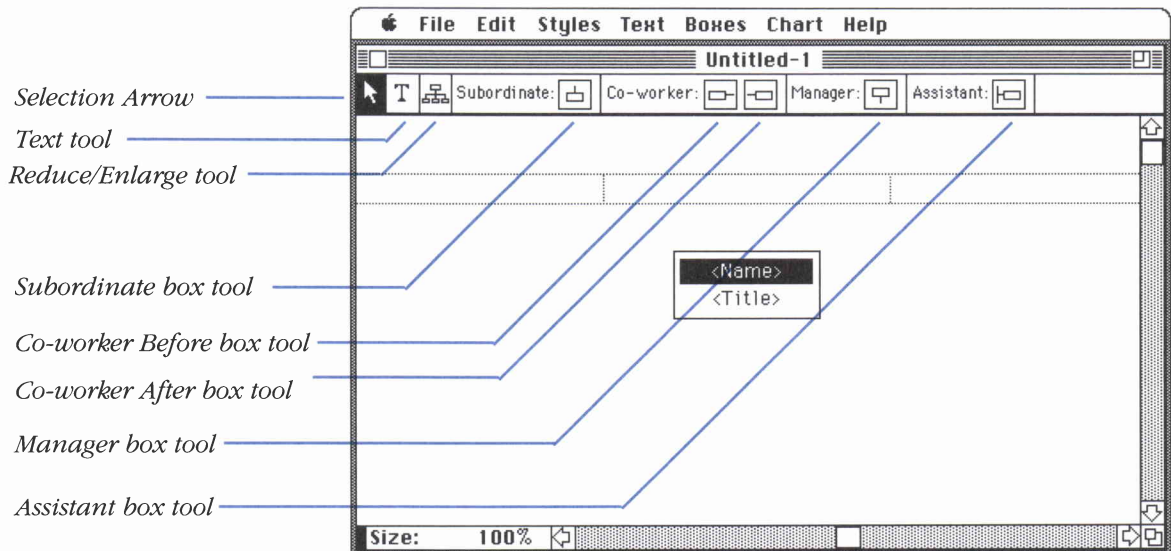
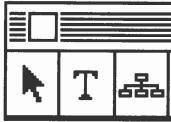
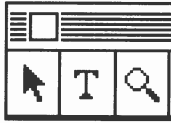


Figure 5-2. The tool palette

The Org Plus tool palette has eight tools:

- The **Selection Arrow** tool for selecting and dragging objects, choosing menu commands, and clicking window and dialog box controls.
- The **Text** tool for typing text into boxes and other areas of your chart. The arrow pointer automatically changes to an I-beam when you move it over text in a selected box.



- The **Reduce/Enlarge** tool for reducing your chart so that it fits in the window, or for magnifying any part of your chart. A magnifier appears if your chart is reduced. A chart symbol appears if your chart is already at actual size. (See the figures to the left).
- The **Subordinate** box tool for creating a subordinate to an existing box.
- The **Co-worker Before** box tool for creating a co-worker above or to the left of an existing box. Whether the box appears to the left or above depends on the group style.
- The **Co-worker After** box tool for creating a co-worker below or to the right of an existing box. Whether the box appears to the to the right or below depends on the group style.
- The **Manager** box tool for creating a manager to an existing box.
- The **Assistant** box tool for creating an assistant to an existing box.

To learn how to use the tools, see “Creating and deleting boxes,” page 79, and “Viewing your chart at actual and reduced sizes,” page 93.

The Apple menu

The Apple menu contains one Org Plus related command.

About Org Plus...

Displays a box containing information about Org Plus. You can then go directly to the Help dialog box.

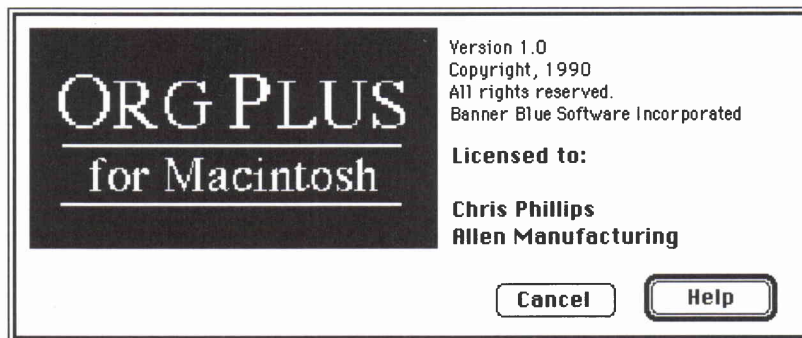


Figure 5-3. The About Org Plus dialog box

For more information about the Org Plus on-line help feature, see "On-line help," page 14.

File	
New	⌘N
Open...	⌘O
Close	⌘W
Save	⌘S
Save as...	
Save Stationery...	
Revert to Saved...	
Page Setup...	
Print...	⌘P
Quit	⌘Q

The File menu

The File menu contains standard commands for creating, opening, saving, and printing charts, and for quitting a session with Org Plus. These commands do the same things as in most other Macintosh applications.

New ⌘N

Creates a new chart and displays the New Label Setup dialog box, shown in Figure 5-4. You can also press Command-N to create a new chart.

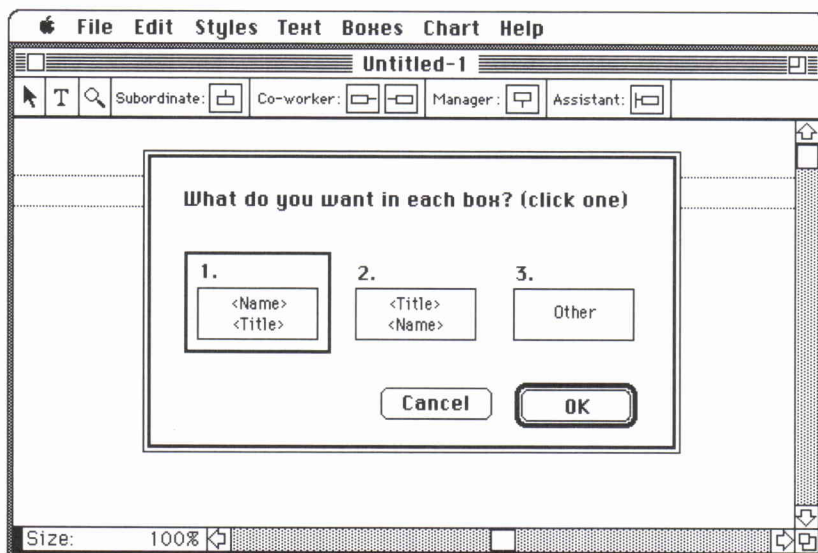


Figure 5-4. A new chart, with New Label Setup dialog box

The New Label Setup dialog box lets you choose or define the labels for the information you want to enter in each box.

See “Creating a new chart,” page 74 for more information.

Open... ⌘O

Displays the Open dialog box, shown in Figure 5-5, from which you can retrieve a chart from disk and display it in a window. You can also press Command-O to display the Open dialog box.

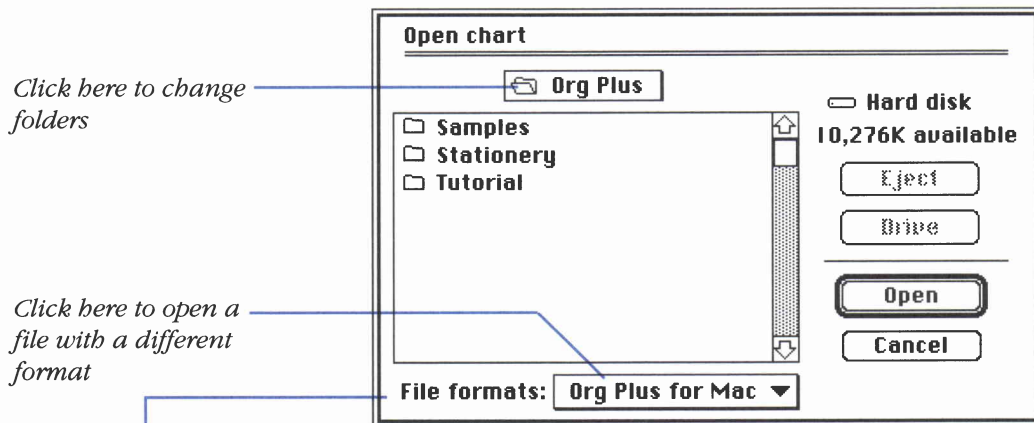
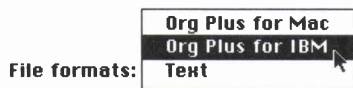


Figure 5-5. The Open dialog box

At the Open dialog box, you can:

- *Change folders* by choosing a folder from the pop-up menu located above the scrolling list (see figure above).
- *Find a chart* in the list by scrolling the list or by typing the first letter of the chart's name.
- *Open an Org Plus chart* by clicking the chart name then clicking the Open button, or by double-clicking the chart name.
- *Open a document created by another application* by choosing a file format from the pop-up menu located below the scrolling list, then finding and opening the document (see figure above).
- *Open Org Plus stationery* by double-clicking the Stationery folder, then double-clicking the stationery chart name. (See “Creating your own stationery,” page 167.)
- *Open a chart on another disk drive* by clicking the Drive button until the disk name appears (or by inserting the disk containing the chart), and then by opening the appropriate chart.
- *Eject a disk* by clicking the Eject button.



Close
⌘W

Closes the current (frontmost) chart without quitting the application. You can also press Command-W.

Save
⌘S

Saves the current chart on your disk. You can also press Command-S.

While you save a chart, Org Plus shows the percent saved in the status area (the lower left corner) of the window. (See Figure 5-1 on page 177).

When you save a chart for the first time, Org Plus displays the Save As dialog box so that you can give the chart a name. (See Figure 5-6.) Thereafter, the chart is always saved with that name unless you choose Save As from the File menu. See "Save as..." below.



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

Save As...

Displays a dialog box that lets you save the current chart under a different name. It also lets you save the chart with a different file format.

Click here to save your chart with a different file format

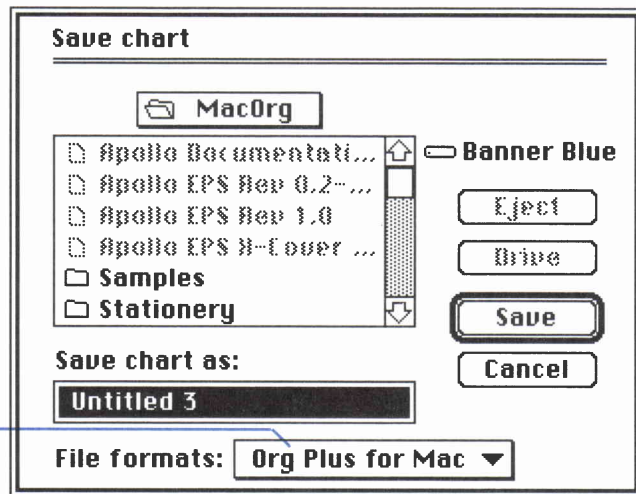


Figure 5-6. The Save As dialog box

At the Save As dialog you can:

- *Save the current chart under a different name* by typing the name and clicking the Save button.
- *Save the current chart with a different file format* by choosing a format from the pop-up menu located below the document list, then clicking the Save button.
- *Save to a different disk drive* by clicking the Drive button until the drive's name appears, then clicking on the Save button.
- *Save to a floppy disk* by inserting the disk in the drive, then clicking on the Save button.

Save Stationery...

Saves the current chart as stationery.

Stationery is a special type of chart that can contain the basic chart design and settings used routinely by you or your company. Stationery is like a pad of preprinted charts with empty boxes. When you open a stationery chart, you “tear off” a standard chart from the pad. You type in information that is unique to your new chart without having to redo the elements that are standard to all your company's charts. Then you save the filled-in chart with its own name.

You can have as many different stationery charts as you like.

Revert to Saved...

Throws away all the changes you've made since you last saved your chart.

Org Plus asks if this is really what you want to do before it does it.

Page Setup...

Displays a dialog box that lets you change the page size, orientation, and special printing effects for your chart.

Org Plus can tell you what this number should be in order to make your chart fit on a single page

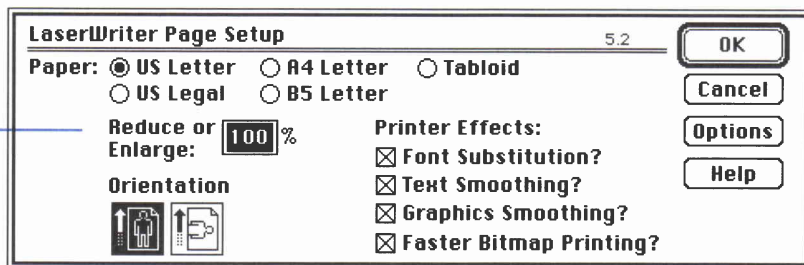


Figure 5-7. The Page Setup dialog box for the LaserWriter

Org Plus can tell you what the Reduce or Enlarge number should be in order to make your chart fit on a page. See “Using the Make Fit command,” page 139.



The Page Setup dialog box varies for different printers. See your Macintosh owner’s manual or the manual that came with your printer for more information about the page setup options for your particular printer.

Print...

⌘P

Displays the Print dialog box, from which you can print the current chart. You can also press Command-P to see this dialog box.

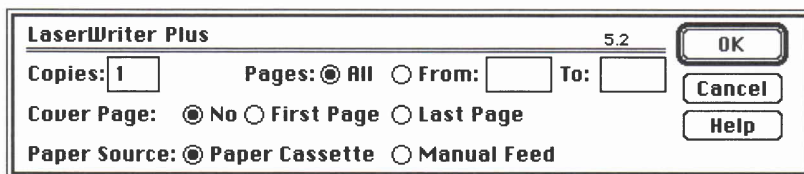


Figure 5-8. The Print dialog box for the LaserWriter



The Print dialog box varies for different printers. See your Macintosh owner’s manual or the manual that came with your printer for more information about the print options for your particular printer.

Quit

⌘Q

Closes all open charts and quits the application. If you’ve made changes to any charts since you last saved them, Org Plus gives you an opportunity to save the changes. You can also press Command-Q.

Edit	
Undo	⌘ Z
Cut	⌘ H
Copy	⌘ C
Copy Setup	
Paste	⌘ V
Clear	⌘ Y
Select	▶
Select Level...	
Label Setup...	⌘ L
Preferences...	

The Edit menu

The Edit menu contains standard commands for undoing your last operation, and cutting, copying, pasting, or clearing objects in your chart. It also contains commands for selecting objects in your chart, changing labels, and changing preset options.

Undo ⌘ Z

Undoes, or reverses, your last operation. Words are added to “Undo” to tell you exactly what will be undone: for example, “Undo cut”.

To undo an operation, you must choose Undo before you do anything else.

Cut ⌘ X

Deletes whatever is selected and places it on the Clipboard.

When an object is cut to the Clipboard, it replaces whatever was there before it. So if you want to paste from the Clipboard, you should do so before you cut something else.

Your chart is usually reformatted when you cut text or boxes.

Copy ⌘ C

Creates a copy of whatever is selected and puts it on the Clipboard.

When an object is put on the Clipboard, it replaces whatever was there before it. So if you want to paste from the Clipboard, you should do so before you copy something else.

Copy Setup

Creates a copy of the label setup for the current box and places it on the Clipboard. You can then paste that setup onto other boxes to give them the same setup. Copy Setup also copies the box border and shadow for the current box.

When a label setup is cut or copied to the Clipboard, it replaces whatever was there before it. So if you want to paste from the Clipboard, you should do so before you cut or copy something else.

See “Changing the label setup,” page 96, for more information.

Paste
⌘V

Places a copy of whatever is on the Clipboard into your chart.

Text objects are pasted at the insertion point.

To paste boxes, you must first select the manager of the boxes on the Clipboard, *then* paste. Boxes are pasted as *subordinates* to the selected box.

When you paste a label setup, Org Plus pastes the label setup plus the box border and shadow.

Clear
⌘Y

Deletes the selected objects from your chart. Cleared objects are *not* placed on the Clipboard. If you change your mind about clearing an object, choose Undo from the Edit menu *immediately*.

Select

Displays a submenu from which you can select a variety of objects in your chart (Figure 5-9).

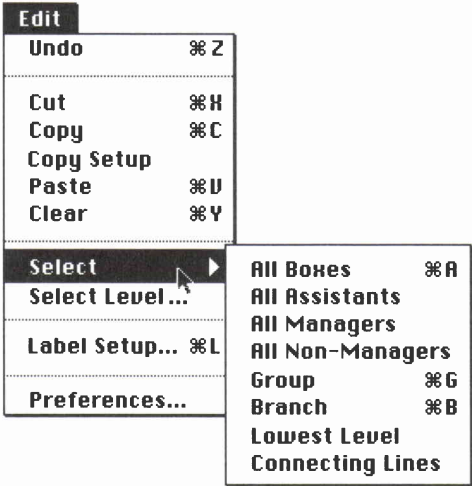


Figure 5-9. The Select submenu

See “Selecting boxes and lines,” page 88, for more information.

Select Levels...

Displays a dialog box from which you can select all the boxes in a range of levels.

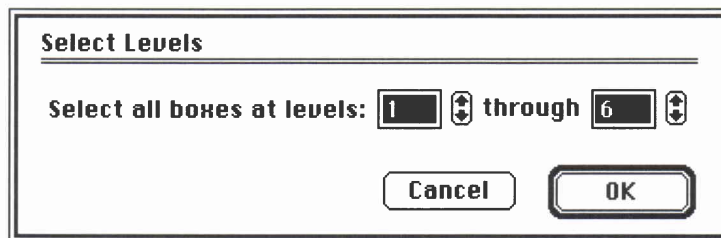


Figure 5-10. The Select Levels dialog box

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

See “Selecting all boxes at the same level,” page 91, for more information.

Label Setup...

⌘L

Displays a dialog box at which you can change the setup of information for the selected boxes.

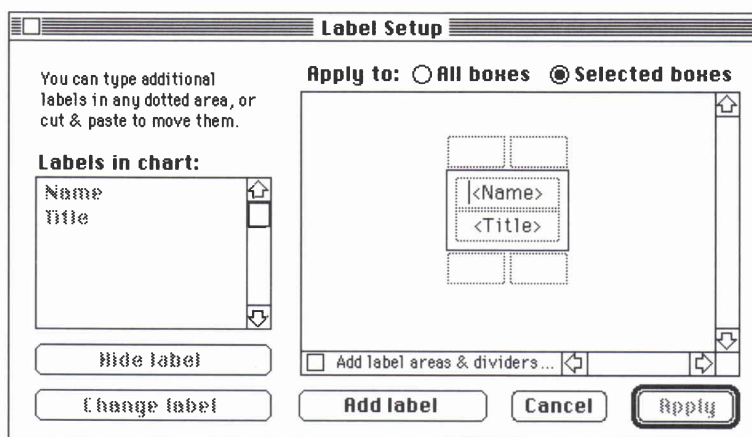


Figure 5-11. The Label Setup dialog box

At the Label Setup dialog box, you can:

- Create new labels for new information in your chart, page 100
- Create and delete areas in which to type labels, page 100

- Move labels, page 102
- Rename and delete labels, page 108
- Hide or show labels, page 104
- Create dividing lines, page 106
- Change margins within a box, page 107

See “Changing the label setup,” page 96, for instructions.

Preferences

Displays a dialog box at which you can change the Org Plus preset options.

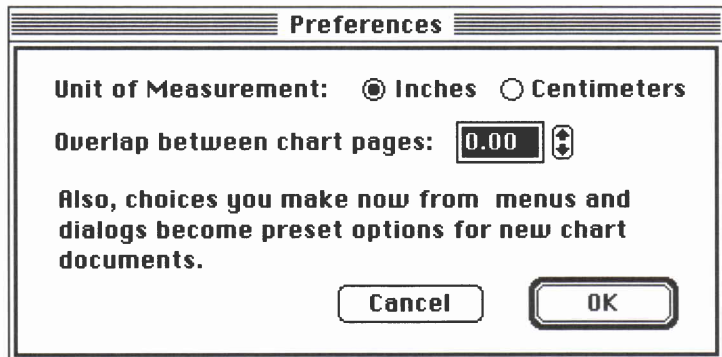
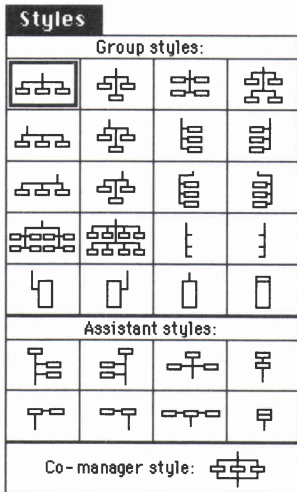


Figure 5-12. The Preferences dialog box

From this dialog box, you can change the preset options for new charts. You can also change the preset option for existing charts.

See “Changing preset options,” page 169, for more information.



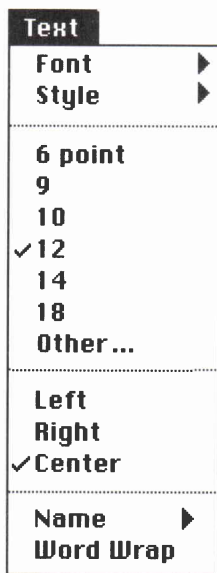
The Styles menu

The Styles menu lets you change the arrangement of boxes in your chart.

The top set of styles lets you change the arrangement of boxes in a group. Double-click any box in a group to select the entire group, then choose a style. See “Changing group styles,” page 111, for more information.

The bottom set of styles lets you change the arrangement of assistant boxes with respect to their manager. Select an assistant box, then choose one of these styles. See “Changing assistant styles,” page 113, for more information.

Use the last style in the Styles menu to show **co-managers** — managers who share responsibility for the same group of subordinates.



The Text menu

The Text menu contains commands that let you change the appearance and behavior of text in your chart.

Fonts

The Font command displays a submenu from which you can choose any of the fonts installed in your system.

Style

The Style command displays a submenu from which you can select a style (Figure 5-13).

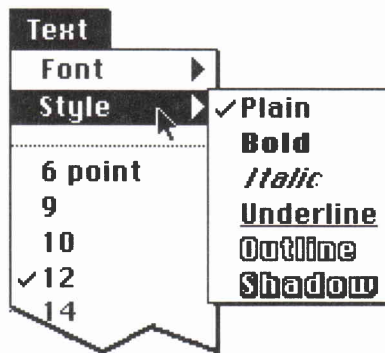


Figure 5-13. The Style submenu

You can give any character, word, or phrase in your chart any style or set of styles.

Text sizes

The point sizes let you change the size of your text. You can give any character, word, or phrase in your chart any one of these point sizes.

A check mark appears next to the size of the currently selected text; if no text is selected, the check mark shows the preset text size.

Other...

Displays a dialog box from which you can choose a point size that is different from those shown on the menu.

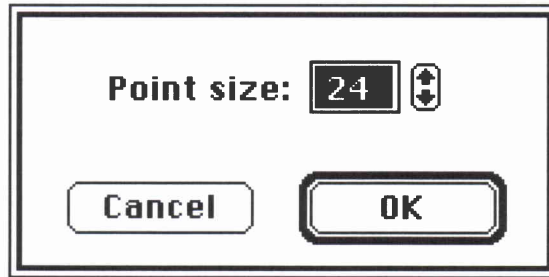


Figure 5-14. The Point Size dialog box

Left, Right, and Center

Centers the selected text, aligns it to the left, or aligns it to the right.

See "Changing text alignment," page 128, for more information.

Name

Displays a submenu from which you can choose a way to format the people's names in your chart (Figure 5-15).

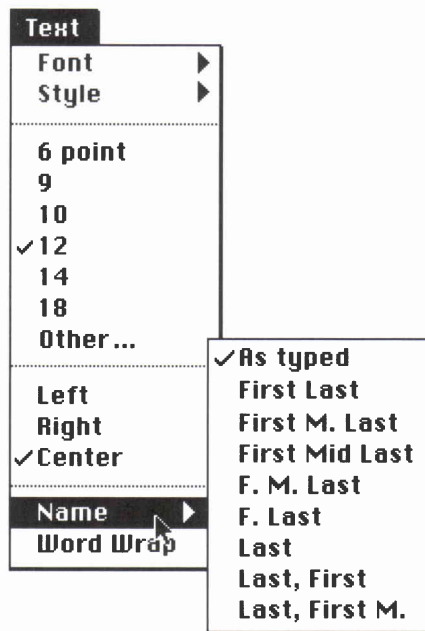


Figure 5-15. *TheName submenu*

As typed shows the selected names exactly as you originally typed them.

See “Formatting people’s names,” page 108, and “Changing people’s name formats,” page 129, for more information.

Word Wrap

Wraps — or splits — selected text across multiple lines. (The text in this paragraph is wrapped across two lines).

See “Wrapping text across lines,” page 128, for more information.

Boxes	
Box Border	▶
Box Shadow	▶
<hr/>	
Line Thickness	▶
Line Style	▶
<hr/>	
Hide Box	
Hide Branch	
<hr/>	
Spacing...	⌘D
<hr/>	
✓Auto Width	
✓Auto Height	
Manual Size...	

The Boxes menu

The Boxes menu contains commands that let you change the size, spacing, and appearance of boxes and lines in your chart. It also contains commands to hide and show boxes and branches.

Box Border

Displays a submenu (Figure 5-16) from which you can choose a border for the currently selected boxes. The current choice in the submenu is shown with a gray border.

Boxes	
Box Border	▶
Box Shadow	▶
<hr/>	
Line Thickness	▶
Line Style	▶
<hr/>	
Hide Box	
Hide Branch	
<hr/>	
Spacing...	⌘D
<hr/>	
✓Auto Width	
✓Auto Height	
Manual Size...	











None	Hair-line
	
	
	
	
	

Figure 5-16. The Box Border submenu

None hides the box border completely.

Hairline produces the finest line your printer can draw.

Box Shadow

Displays a submenu (Figure 5-17) from which you can choose a shadow for the currently selected boxes. The current submenu selection is indicated by a gray border.

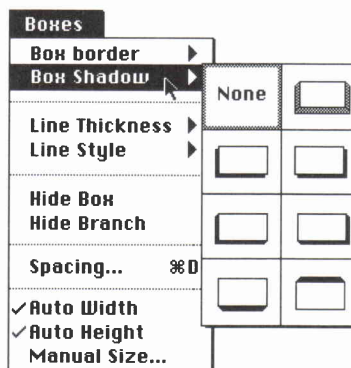


Figure 5-17. The Box Shadow submenu

Line Thickness

Displays a submenu (Figure 5-18) from which you can choose a thickness for the currently selected lines.

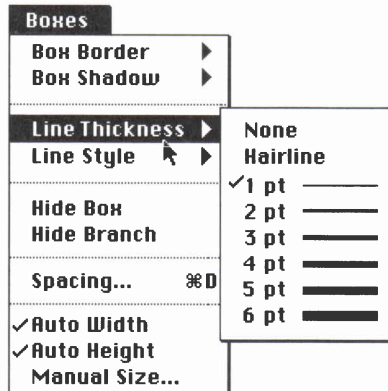


Figure 5-18. The Line Thickness submenu

None hides the selected lines completely.

Hairline produces the finest line your printer can draw.

Line Style

Displays a submenu (Figure 5-19) from which you can choose a style for the currently selected lines:

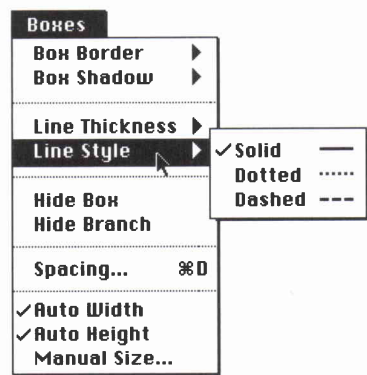


Figure 5-19. The Line Style submenu

Show/Hide Box

Lets you hide the selected box or make it visible again. Org Plus automatically redraws connecting lines so that no gaps are left in your chart.

Hiding boxes lets you create special drawing effects. See “Showing/hiding boxes,” page 149, for more information.

Show/Hide Branch

Lets you hide the selected manager's branch or make it visible again. (You can also do this by clicking the manager's branch symbol — a little zoom box — in the lower right corner of the box.)

Hiding all branches except the ones you're working on improves the application's performance and allows you to keep your chart simple and uncluttered while you work. You can show all the hidden branches when you're ready to print, or just print the visible branches.

See “Showing/hiding branches,” page 150, for more information. Also see “Time saving measures” on page 211.

Spacing...

⌘D

Displays the Spacing dialog box, from which you can change the distance between boxes in all or selected groups. You can also press Command-D to see this dialog box.

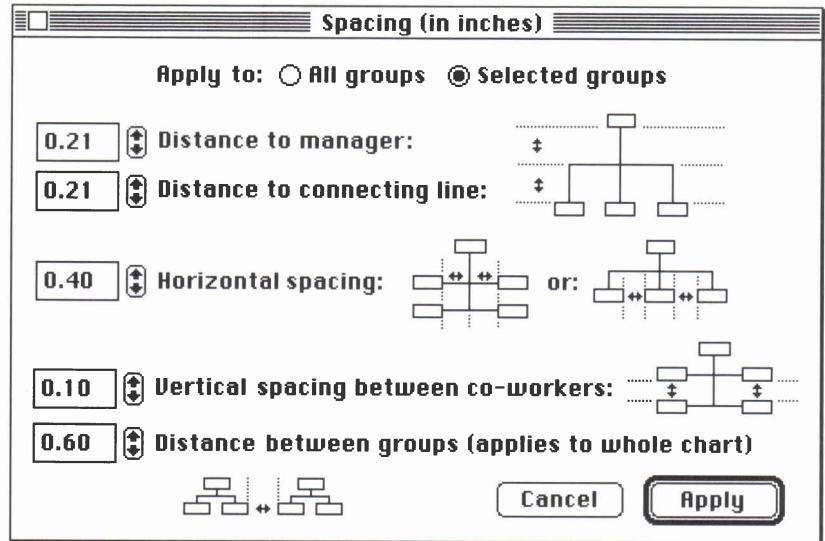


Figure 5-20. The Spacing dialog box

See “Changing the distance between boxes,” page 119, for more information.

Auto Width

Lets you turn automatic width sizing on or off for the selected boxes. A check mark appears next to the command if automatic sizing is in effect for the selected box.

Starting out, all boxes at the same level have the same width. No box is wider than its manager's box.

Automatic width sizing gives boxes with the same status the same width. If, however, you need to make a box as narrow as possible, select the box and choose this command to turn off automatic width sizing. To turn it back on, select the box and choose the command again. See “Making boxes larger or smaller,” page 123, for instructions.

Auto Height

Lets you turn automatic height sizing on or off for the selected boxes. A check mark appears next to the command if automatic height sizing is in effect for the selected box.

Starting out, all boxes at the same level have the same height.

Automatic height sizing gives boxes with the same status the same height. If you need to make a box as short as possible, select the box and choose this command to turn off automatic height sizing. To turn it back on, select the box and choose the command again.

See “Making boxes larger or smaller,” page 123, for instructions.

Manual Size...

Displays a dialog box at which you can give the selected boxes a fixed size.

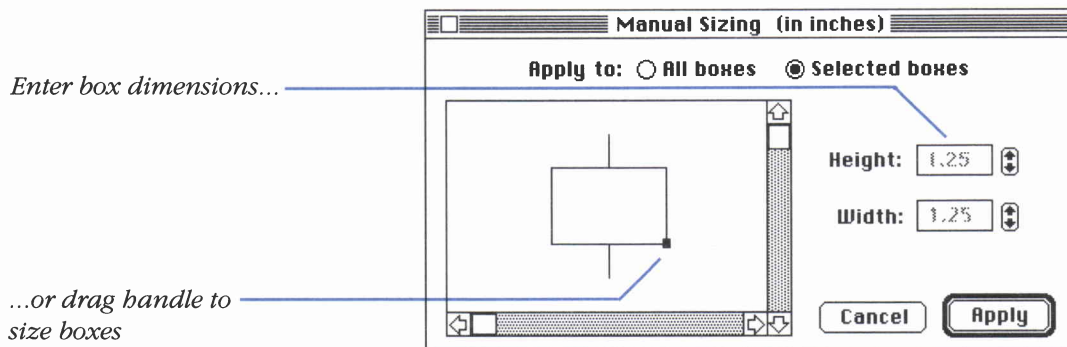


Figure 5-21. The Manual Size dialog box

At this dialog box you can:

- *Change the size of the selected boxes* by typing in their height and width (or by clicking the arrow controls next to the text boxes).
- *Change the size of the selected boxes* by dragging the handle in the lower right corner of the box inside the dialog box.
- *Apply the changes without closing the dialog box.* (You can drag the dialog box to the side of your screen so that you can see the effect of your changes.)

See “Giving a box a fixed size,” page 124, for instructions.

Chart	
Make Fit...	⌘M
Size to Window	⌘I
50% of Actual	⌘J
✓ Actual Size	⌘K
Show Edit Panel	⌘E
Show Page Lines	
Hide Symbols	
Show Draw Tools	⌘T
Center Up/Down	
✓ Center Left/Right	
✓ Untitled-1	⌘1

The Chart menu

The Chart menu contains commands that affect your entire chart and working environment.

The bottom of the menu shows the names of the currently open charts. A check mark appears next to the name of the current chart — the one whose window is in front. You can go directly to any open chart by choosing its name from the bottom of this menu. You can also type the document's Command key equivalent.

Make Fit... ⌘M

Displays a dialog box from which you can select space-saving options and find out how much to reduce your chart in order to make it fit in a specified number of pages.

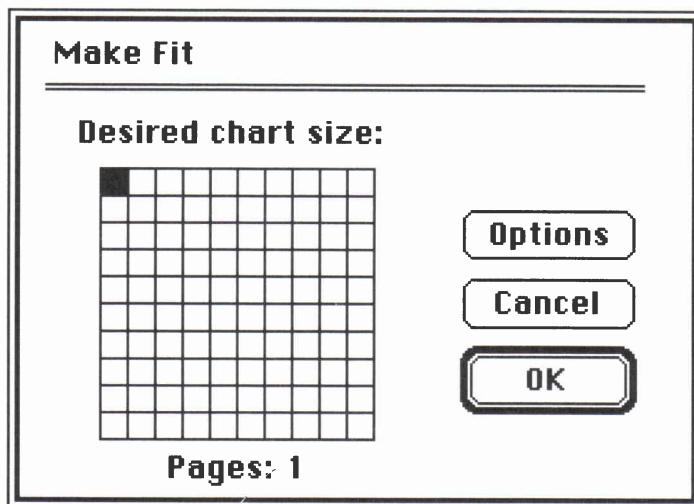


Figure 5-22. The Make Fit dialog box

At the Make Fit dialog box you can:

- *Select the number of pages you want your chart to fit on by clicking one of the squares.*
- *Specify what options you want Org Plus to use to make your chart fit by clicking the Options button, and making selections at the Make Fit Options dialog box (Figure 5-23).*

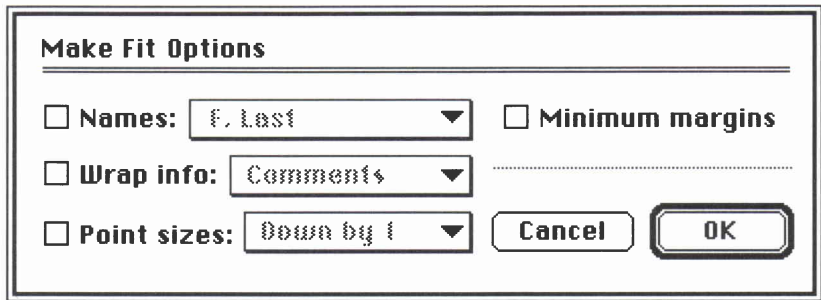


Figure 5-23. The Make Fit Options dialog box

At the Make Fit Options dialog box, you can:

- *Abbreviate people's names in your chart* by choosing a style of abbreviation from the Names pop-up menu.
- *Wrap (split) selected information (such as comments) across several lines* by choosing the label for the information from the Wrap Info pop-up menu.
- *Make all the text in the boxes of your chart larger or smaller* by choosing an item in the Point Sizes pop-up menu.

When you click OK at the Make Fit Options dialog box, the Make Fit dialog box reappears. When you click OK at the Make Fit dialog box, Org Plus implements your space-saving options and, if they aren't enough to make your chart fit, tells you how much to reduce your chart (Figure 5-24).

*Reduce to this
percent of full
size*

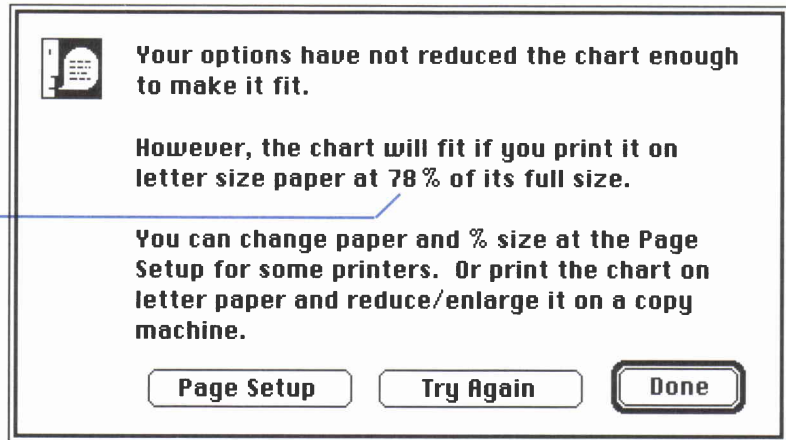


Figure 5-24. The How to Fit message

See “Using the Make Fit command,” page 139 for more information.

Size to Window

⌘I

Displays the entire chart in the current window. You can also press Command-I, or use the Reduce/Enlarge tool in the tool palette.

See “Viewing your chart at actual and reduced sizes,” page 93, for more information.

50% of Actual

⌘J

Displays your chart at 50% of its actual size. You can also press Command-J.

See “Viewing your chart at actual and reduced sizes,” page 93, for more information.

Actual Size

⌘K

Displays your chart at actual size — the size at which it will print. You can also press Command-K, or use the Reduce/Enlarge tool in the tool palette.

See “Viewing your chart at actual and reduced sizes,” page 93, for more information.

Show/Hide Edit Panel

⌘E

Shows or hides the edit panel. See “Seeing and editing information not shown in your chart,” page 86, for more information.

The edit panel shows *all* the information for the selected box, as shown in Figure 5-25.

See and edit all the information for a person here, including information which may not be visible in the chart

Select this to show new text in the chart as you type it into the edit panel

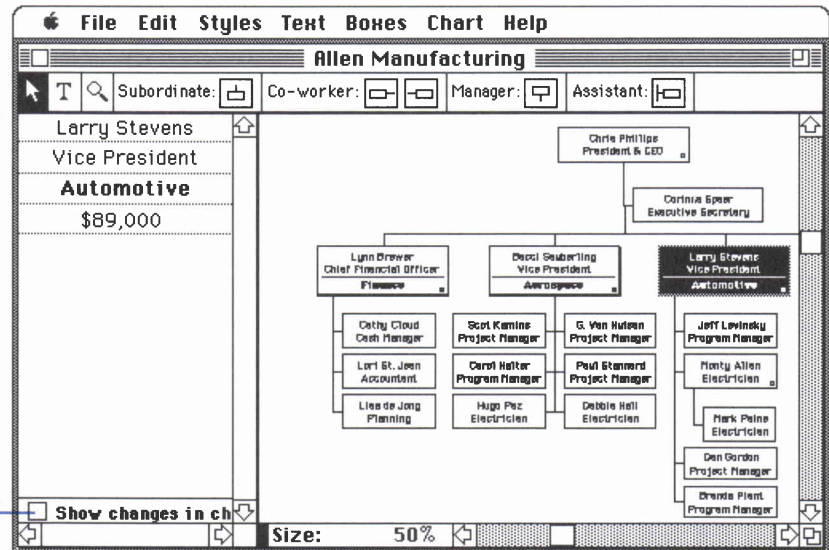


Figure 5-25. The chart window with the edit panel open

Use the edit panel when you want to:

- See and edit information not visible to you in a box in your chart. (See “Seeing and editing information not shown in your chart,” page 86.)
- See and edit information when your chart appears at a reduced size.
- Enter information quickly. (See Appendix B, “Time Saving Measures,” on page 211.)

Show/Hide Page Lines

Shows or hides the margins, title area lines, and page borders in your chart. Choose Show Page Lines in order to change margins, enter titles in the title areas, or see how many pages your chart covers.

See “Changing your chart margins,” page 172 for more information.

Show/Hide Symbols

Shows or hides the manager's branch symbol. Choose Hide Symbols and Hide Page Lines to see exactly what your chart will look like when printed.

Show/Hide Draw Tools ⌘T

Shows or hides the draw tools (Figure 5-26). You can also press Command-T.

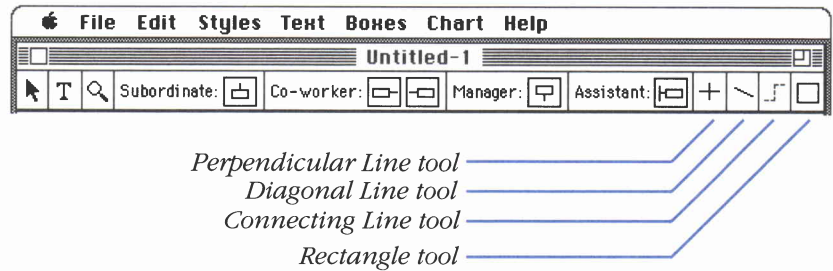


Figure 5-26. The draw tools

Use these tools to create extra lines and boxes in your chart.

See “Special effects through manual drawing,” page 153 for more information.

Center Up/Down

Keeps your chart centered between top and bottom margins, no matter what changes you make to your chart.

Choose the command to activate it; choose it a second time to deactivate it. A check mark appears next to it when it is activated.

See “Moving and centering your chart,” page 118, for more information.

Center Left/Right

Keeps your chart centered between left and right margins, no matter what changes you make to your chart.

This command has a check mark next to it when it is active. Choose the command to deactivate it; choose it a second time to reactivate it.

See “Moving and centering your chart,” page 118, for more information.

Help	
Help Topics...	⌘H
Creating bones...	
Rearranging bones...	
Spacing bones...	
Sizing bones...	
Moving bones...	
Entering text...	
Rearranging text...	
Making it fit...	
Custom drawing...	
Using stationery...	
Time saving ideas...	

The Help menu

The Help menu commands give you help for the most common operations.

Each command displays the Help dialog box, opened automatically to the desired topic. From the Help dialog box, you can choose other topics.

See “On-line help,” page 14, for more information.

Appendix A: The Art of Charting

This appendix offers guidelines to help you create effective and professional looking organization charts.

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

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

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

Keep your chart simple

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

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

Keep your chart uncluttered

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

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

Keep your chart small

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

If you have a large organization chart, break it up into separate charts by division or department. For instructions, see “Creating books of charts,” page 148.

Sometimes you want the entire chart on a single page, even if that makes it look crowded. See “Making your chart more compact,” page 132, for ideas on how to make your chart more compact without compromising readability.

Be consistent

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

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

Box sizes

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

In general the following rules work best:

Make all boxes at the same level the same height and width. Let no box be wider than its manager's box.

Org Plus automatically sizes boxes according to these rules unless you disable automatic sizing or manually change the size of the boxes. (See “Making boxes larger or smaller,” page 123.)

Spacing between boxes

Use consistent spacing throughout your chart.

Starting out, the preset options in the Spacing dialog box ensure that the distances between boxes are consistent. If you change the settings, change them for *all* boxes in your chart. (See “Changing the distance between boxes,” page 119 for more information.)

Font/Sizes/Styles

If possible, limit yourself to one font and no more than three sizes for all information in your chart. Use larger point sizes toward the top of your chart and smaller ones toward the bottom. Use text styles (boldface, italics, and so on) sparingly and consistently. (See “Changing text, line, and box styles,” page 127.)

Label setups

Arrange information the same way in each box. If necessary you can show less information the lower you go in your chart. That also helps keep your chart as compact as possible. (See “Changing the label setup,” page 96.)

Group styles

Use the same or similar group styles for groups with the same status. Sequence boxes of equal status according to some impersonal rule, such as alphabetic order. (See “Changing group styles,” page 111.)

Chart designs

If you create many charts for your company, use stationery to ensure a consistent design. (See “Creating your own stationery,” page 167). Use the same group styles for equivalent divisions or departments whenever possible. Place titles and other annotations in the same place in each chart. (See also “Creating books of charts,” page 148.)

Label your chart clearly

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

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

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

- The name of the company
- The name of the main organizational group (e.g., Finance)
- The name of the organizational unit depicted in the chart (for instance, Accounting)

Date your chart

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

Authorized by:	Chris Phillips
Created by:	Corinne Speer
Date:	Sept 9, 1990

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

(See “Annotating your chart,” page 161.)

Appendix B: Time Saving Measures

This appendix reviews some of the features and techniques you can use to shorten the time it takes to create and update a chart.

Use stationery

If you create multiple charts for your organization, use the stationery feature whenever possible.

When you use the stationery feature, you only have to create your company's basic chart once. The stationery chart is a template, like a business form. When you open a stationery chart, you "tear off" a standard chart from the pad. You then type in the information that is unique to your new chart without having to redo the elements that are standard to all charts. This not only saves time, but ensures that your charts have a uniform appearance.

See "Creating your own stationery," page 167, for more information.

Use keyboard shortcuts instead of the mouse

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

See Appendix C, page 215 for a summary of the Org Plus keyboard and mouse shortcuts.

Use the Reduce/Enlarge tool

The fastest way to move around a large chart is to use the Reduce/Enlarge tool. (Scrolling with the scroll bar is perhaps the slowest way!) See "See any box in your chart," page 94, for instructions.

Minimize formatting time

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

Hide branches you don't need

Hide branches that you aren't working with until you're ready to print. Org Plus doesn't reformat hidden branches. See "Showing/hiding branches," page 150.

Create multiple boxes at a time

Org Plus reformats your chart every time you create a box. It takes just as much time to reformat your chart for one new box as it does for multiple boxes. See "Creating multiple boxes of the same type," page 81.

Create boxes in actual size

Create boxes with your chart shown at actual size. Org Plus only redraws the visible portion of your chart, and Actual Size displays the least. The less that is visible, the faster the process.

Use the edit panel

You can enter information more quickly if you do it with the edit panel filling the window (this hides your chart). Org Plus doesn't recalculate, reformat, or redraw your chart until you redisplay the chart. Here's what to do:

1. **Create or select the box whose information you want to enter or edit.**
2. **Press Command-E to display the edit panel.**
3. **Drag the edit panel handle all the way to the right edge of the window.**

The edit panel handle is the little black bar located in the lower right corner of the edit panel. If you drag it all the way to the right, your chart won't be visible, and the edit panel will fill the window.

4. **Create boxes and enter information.**

To create boxes with the edit panel open, Command-click the box tools in the tool palette. For example, to create a co-worker to the right of the current box, Command-click the Co-worker After box tool (the second Co-worker tool).

See "Seeing and editing information not shown in your chart," page 86, for more information about using the edit panel.

5. Press Command-E to redisplay your chart.

You can do this every so often in order to see your chart or move to boxes in different areas of the chart. Command-E switches you between a view of the chart and a view of the edit panel.

Use the keystrokes shown below to select the manager, co-workers, or subordinates of the current box without redisplaying the chart:

To select this...	Press this...
The manager	Option-Up Arrow
The co-worker before (to the left or above the current box, depending on the group style)	Option-Left Arrow
The co-worker after (to the right or below the current box, depending on the group style)	Option-Right Arrow
The first subordinate	Option-Down Arrow

If you want to use the edit panel with your chart visible, make sure “Show changes in chart” isn’t checked. When this item is checked, text appears in the edit panel as well as in the chart while you type — which takes time on slower machines. When “Show changes in chart” is not checked, text appears in the chart when you deselect the current box.

Appendix C: Keyboard & Mouse Shortcuts

In addition to the Command key equivalents menu commands (visible in the menus themselves), Org Plus has many other keyboard and mouse shortcuts.

Creating boxes

To create boxes by means of the keyboard, you can first select the box to which the new box will be attached, then press the key combinations shown in the following table:

To do this...	Press this...
Create a subordinate	Shift-Command-S
Create a co-worker before (to the left or above the current box, depending on the group style)	Shift-Command-B
Create a co-worker after (to the right or below the current box, depending on the group style)	Shift-Command-A
Create a manager	Shift-Command-M
Create an assistant	Shift-Command-I

You can also create boxes by selecting a box in your chart, pressing and holding the Command key, then clicking a box tool.

Entering information

To edit the first item of information in a selected box, press Return or Enter.

Viewing your chart

The following table summarizes the keystrokes that let you view your chart.

To do this...	On any keyboard	Ext. keyboard
See your entire chart in the window (size it to fit in your window)	Command-I	Command-I
See your chart reduced to 50% of actual size	Command-J	Command-J
See your chart at actual (printing) size	Command-K	Command-K
See the part of your chart above the window	Command-Up Arrow	Page Up, Command-Up Arrow
See the part of your chart below the window	Command-Down Arrow	Page Down, Command-Down Arrow
See the part of your chart to the left of the window	Command-Left Arrow	Command-Left Arrow, Command-Page Up
See the part of your chart to the right of the window	Command-Right Arrow	Command-Right Arrow, Command-Page Down
See the topmost box in your chart	Option-Command-Up Arrow	Home, Option-Command-Up Arrow
See boxes at the bottom of your chart	Option-Command-Down Arrow	End, Option-Command-Down Arrow

Selecting and editing boxes

To select boxes next to a currently selected box, use the following keystroke combinations:

To do this...	Press this...
Select the co-worker before (to the left or above the current box, depending on the group style)	Option-Left Arrow
Select the co-worker after (to the right or below the current box, depending on the group style)	Option-Right Arrow
Select the current box's manager	Option-Up Arrow
Select the current box's first (leftmost or topmost) subordinate	Option-Down Arrow
Edit the currently selected box	Return or Enter

Making dialog box selections

When a dialog box appears, you can press keys instead of clicking the following buttons:

To select this...	Press this...
The OK button (or any other button with the thick border)	Return
The Cancel button	C, or Command-Period
The Yes button	Y
The No button	N

Using the modifier keys with the mouse

You can use the Shift, Control, Option, and Command keys to modify many mouse operations, as follows:

To do this...	Press & hold...	While you...
Temporarily get the Reduce/Enlarge tool pointer	Control	Click in the chart
Move a box without moving its subordinates	Command	Drag a box to its new location
Replace the contents of one box with the contents of another	Option	Drag one box over the one whose contents you want to replace
Temporarily keep a tool in the tool palette active	Option	Click a tool and use it
Drag any group up or down, or drag a horizontal group left or right	Shift	Drag any box in the group
To create a box next to the currently selected box in your chart	Command	Click a box tool in the top palette
Copy a rectangular area of your chart to the Clipboard (as a PICT formatted image) in order to paste it to another application	Option-Command	Drag a rectangle anywhere in your chart

File operations

Whenever you see a dialog box that lets you select charts or other documents (for instance, the Save and Open dialog boxes), you can type the first letters of the document you want in order to highlight it.

Appendix D: Operating Limitations

Minimum hardware	Mac Plus
Minimum disk configuration	Hard disk and 800K floppy drive, or two 800K floppy drives
Minimum memory (RAM) required	1 megabyte
Minimum system software	System 4.1
Maximum charts open at one time	16
Maximum boxes per chart	2,000
Maximum number of levels	50
Maximum number of labels	24
Maximum number of characters per item of information	3,000
Maximum number of characters per box	32,000
Maximum number of boxes per group	100
Minimum box size	.25" wide by .128" high
Maximum box size	250" X 250"
Maximum chart size	250" X 250"

Appendix E: Using Org Plus with Other Applications

This appendix presents detailed instructions on opening and closing documents created with other applications. It also includes instructions for using the Clipboard to paste Org Plus charts into other applications (such as a word processor).

Opening Org Plus for IBM documents

Org Plus for Macintosh can open documents created by all IBM® versions of Org Plus and Org Plus Advanced.

You must first transfer the IBM Org Plus document to your Macintosh. You can do this on some types of networks. In addition, if your Macintosh is equipped with the Apple SuperDrive, you can use the Apple File Exchange utility to transfer documents on 3.5-inch IBM formatted disks to your Macintosh. Consult your Macintosh owner's manual for further instructions.

You can open the IBM Org Plus document when it appears in a folder on your Macintosh desktop. To open the document, do the following:

1. **Start the Org Plus (for Macintosh) application.**
2. **Choose Open from the File menu.**

The Open dialog box appears.

3. **Choose Org Plus for IBM from the File formats pop-up menu.**

Position your arrow pointer over the File formats box, press the mouse button, then choose the item (see Figure E-1).

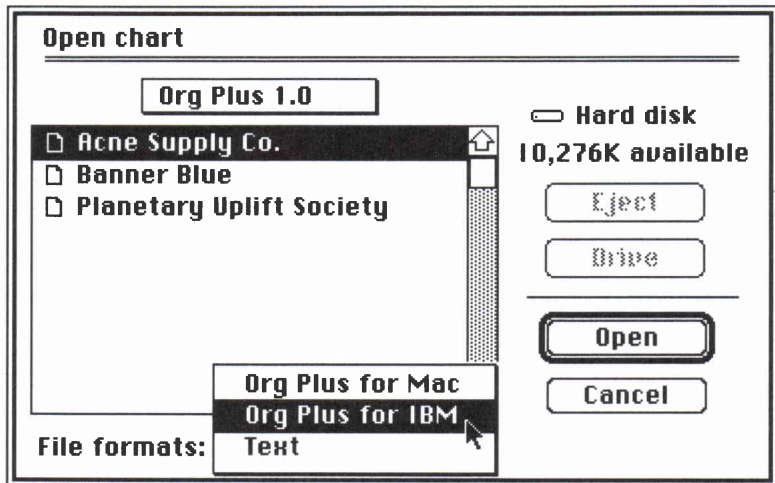


Figure E-1. Opening an Org Plus for IBM file

4. Locate and open the IBM Org Plus file.

Org Plus creates a new, untitled chart containing the information in your IBM Org Plus file. All data and most chart formatting options are copied to your new chart.

You can change and save your new Org Plus chart as you can any other Org Plus (for Macintosh) chart. Your IBM Org Plus file isn't affected in any way.

Differences between IBM and Macintosh versions

There are several differences between Org Plus for Macintosh and Org Plus for IBM.

- Org Plus for Macintosh version 1.0 does not support the creation of Tables and Reports.
- Org Plus for Macintosh imports numbers, but doesn't consolidate them as in Org Plus for IBM.
- Org Plus for Macintosh gives you much more control over the appearance of your chart. Any group can have any chart style.
- Org Plus for Macintosh is more sophisticated about the way it arranges boxes on the page. It can create much more compact charts than Org Plus for IBM.

Saving as Org Plus for IBM

Org Plus for Macintosh can save charts in a file format that can be read directly by the following IBM versions of Org Plus and Org Plus Advanced:

- Org Plus version 3.1
- Org Plus Advanced version 4.0
- Org Plus Advanced version 5.0

To save your Org Plus for Macintosh chart in a format readable by any of these versions, do the following:

1. **Choose Save As from the File menu.**
2. **Choose Org Plus for IBM from the File formats pop-up menu.**

Position the arrow pointer over the File formats box, press the mouse button, and choose the item (Figure E-2).

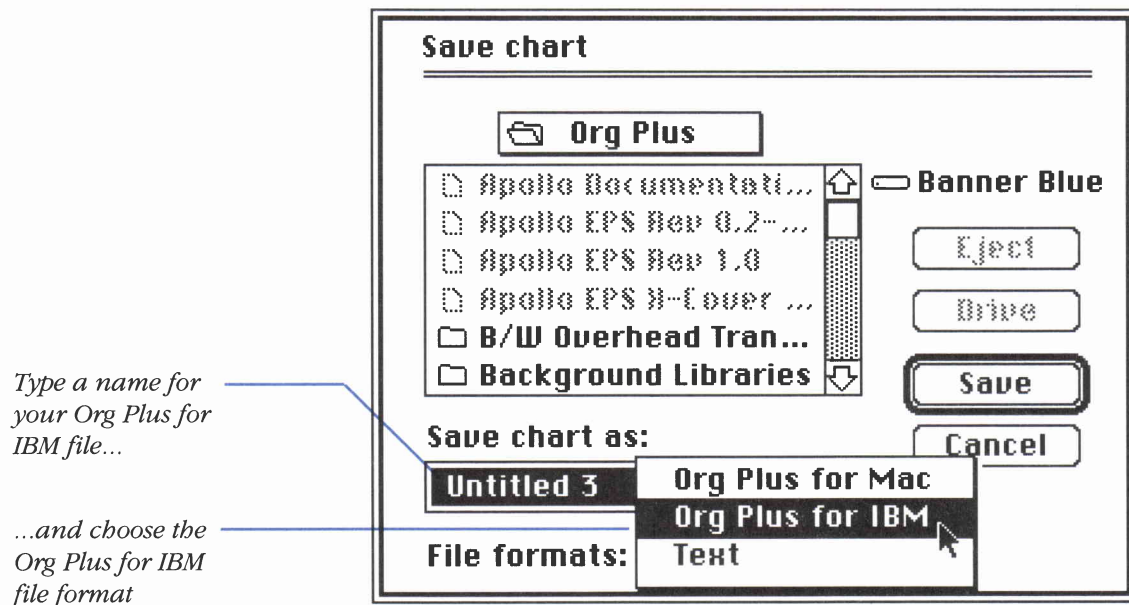


Figure E-2. Saving as an Org Plus for IBM file

3. **Type a name for your file in the text box.**
4. **Click the Save button.**

Once you have saved the file, you must transfer it to a disk on your IBM or IBM-compatible system. You can do this on some types of networks. In addition, if your Macintosh is equipped with the Apple SuperDrive, you can use the Apple File Exchange utility to transfer your file on your Macintosh disk to a 3.5-inch IBM formatted disk. Consult your Macintosh owner's manual for further instructions.

You can then open your chart with your IBM version of Org Plus or Org Plus Advanced.

Opening Text documents

Org Plus can open text documents created by other applications, such as data base or word processing applications.

Org Plus can open any text file that is in the tab delimited ASCII file format. "ASCII" stands for "American Standard Code for Information Interchange". Check whether your application can save information in that format.



In order to import a text document, the data values in the text document must be separated by tabs. Each **record** — each row — in your text document must have the same information in the same order. See Figure E-3.

If your data records contain the name of the employee's manager, Org Plus can preserve the reporting relationships. If not, Org Plus creates arbitrary reporting relationships that you can then change by moving the boxes around. (See "Moving boxes in your chart," page 115.)

For example, if your text document appears as shown in the top window of Figure E-3, your chart will appear as shown in the lower window. If, however, your text document appears as shown in the top window of Figure E-4, the chart will appear differently.

To open a text file, do the following:

1. **Start the Org Plus application.**
2. **Choose Open from the File menu.**

The Open dialog box appears.

3. **Choose Text from the File formats pop-up menu (located in the lower left corner of the dialog box).**

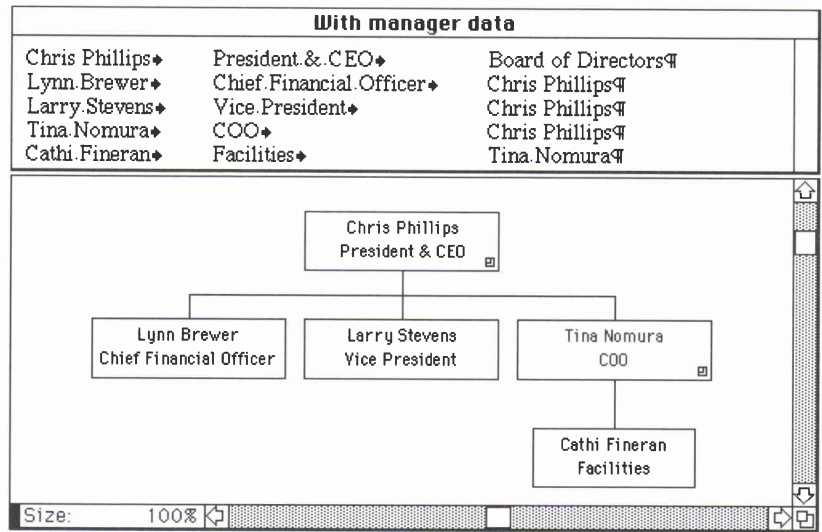


Figure E-3. Preserving the reporting relationship

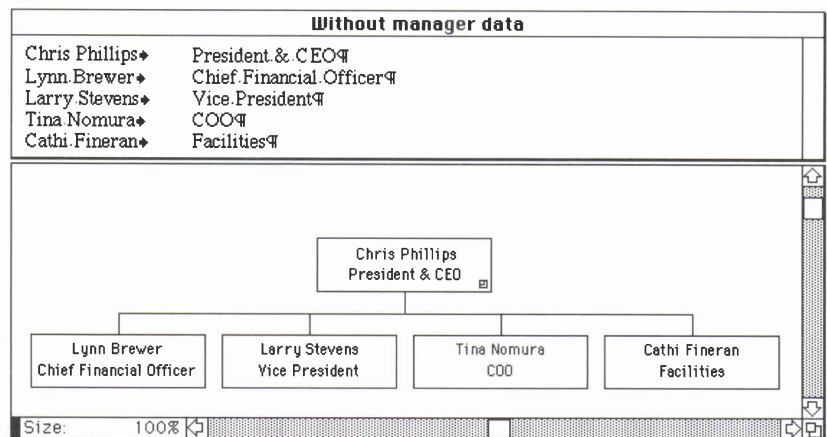


Figure E-4. An arbitrary reporting relationship

4. Locate and open the text document.

A dialog box appears asking whether the text document contains the name of each record's manager.

If the text document doesn't contain the name of the manager, click No, and stop here. You don't need to read further. Org Plus creates a new, untitled chart, that you can change and save as you would any other Org Plus chart.

If the text document does contain manager data, click Yes.

The Text Import dialog box appears, as shown in Figure E-5.

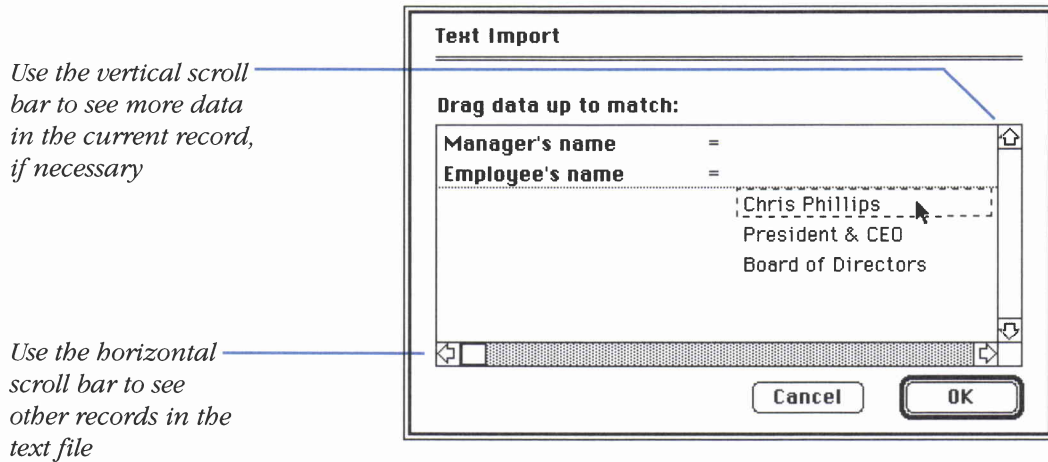


Figure E-5. The Text Import dialog box

The data in the first record of the text document appears in a column at the lower right. Scroll down to see all of the data for the current record if it's not currently visible.

You can also scroll to the right to see the data for other records in the text document.

5. **Drag up the manager's name until it appears after the first equal sign (see Figure E-6).**
6. **Drag up the employee's name until it appears after the second equal sign (see Figure E-6).**

= Chris
A.
Phillips

If your text document has the name parts (first name, middle name, last name) separated by tabs, the name parts will appear on different rows in the Text Import dialog box. Drag all the name parts up so that they are stacked up to the right of and below the equal sign (see figure to left). Make sure you put them in the right order (first name above middle name, middle name above last name).

When steps 5 and 6 are complete, you should have a data value opposite the two equal signs, as shown in Figure E-6.

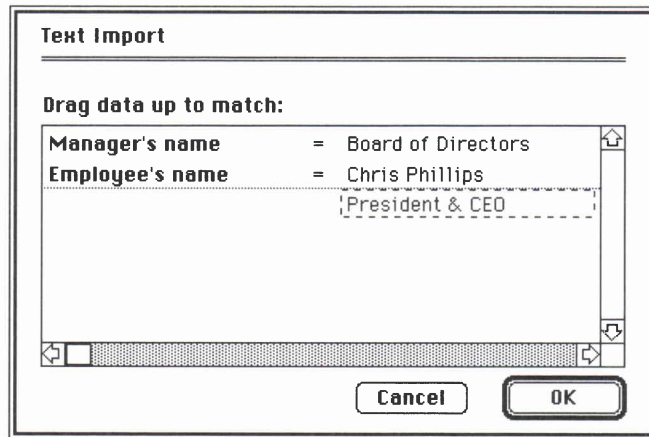


Figure E-6. Matching the data values

If each data record has the same data in the same order, the match up will be correct for all records in the text file. You can verify this by clicking the left and right arrows of the horizontal scroll bar to view the other data records in the text document.

7. Click the OK button.

Org Plus creates a new, untitled chart that you can change and save as you would any other Org Plus chart.

Saving as a text document

To save an Org Plus chart as a text document, do the following:

- 1. Choose Save As from the File menu.**
- 2. Choose Text from the File formats pop-up menu.**
- 3. Type a name for your text document in the text box.**
- 4. Click the Save button.**

Org Plus creates a text document containing all the data that you have typed for each box in the chart. The text document is saved in tab delimited ASCII format. Many applications have the ability to read documents with data in this format.

Copying and pasting between applications

You can copy text from most Macintosh applications to the Clipboard and then paste it into your chart wherever you see an insertion point (the blinking bar).

You can copy pictures in many Macintosh applications directly to the Clipboard and then, in Org Plus, paste them directly into your chart. See “Pasting pictures into your chart,” page 165, for details.

You can also copy and paste a rectangular portion of your chart to the Clipboard and then paste it into an application that accepts PICT images. PICT is a special format for graphic images.

1. Choose the level of magnification you want from the Chart menu.

What you see in the chart window is exactly what you can copy to the Clipboard.

To copy an image of the entire chart, choose Size to Window.

2. Press and hold Option-Command while you drag a rectangle around the portion of your chart you want to copy to another application.

When you release the mouse button, the contents of the rectangular area you defined are copied to the Clipboard as a PICT image.

3. Switch to the document in the other application where you want to paste the chart image.

4. Click or position the insertion point where you want to paste the PICT image.

5. Choose Paste from the Edit menu.

Glossary

Terms shown in *italics* are defined elsewhere in the Glossary.

Annotation

Miscellaneous text entered into your chart for the purposes of labeling, clarifying, or explaining the elements in your chart.

Assistant

A box that provides administrative assistance, advice, or even managerial assistance to its *manager* (sometimes referred to as “staff” boxes). Some assistants, such as secretaries, provide administrative assistance only. Other assistants may actually operate in the place of their managers when the manager isn’t present. Different *assistant styles* are available to show the particular type of relationship between the assistant and its manager. See “Changing assistant styles,” page 113.

Assistant style

A way to represent the *assistant-manager* relationship graphically. Assistant styles are available from the Styles menu.

Automatic sizing

The feature which ensures that the boxes in your chart have uniform sizes.

Book of charts

A set of charts which, as a whole, present the entire organization or a substantial portion of it.

The individual charts in a book of charts are stored and maintained as separate Macintosh documents.

See “Creating books of charts,” page 148, for more information.

Branch

A *box* and all the boxes that report to it.

Branch symbol

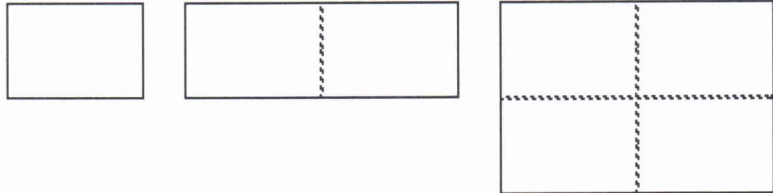
A little box appearing in the lower right corner of manager boxes. It indicates that the box has subordinate boxes. You can click the branch symbol to show or hide the branch. See “Showing/Hiding branches,” page 150, for more information.

Chart

A graphic representation of an organization; the type of document that Org Plus creates.

Chart page area

The area occupied by the chart. This area consists of a single page or a number of pages placed side by side to produce a larger rectangular area. For example:

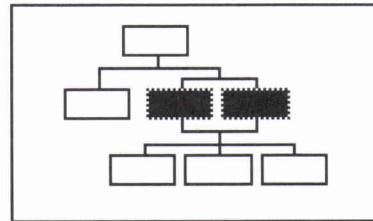


Candystripes show the borders between two adjacent pages.

Org Plus automatically adds and subtracts pages to the chart's page area as needed to contain the chart. It preserves the basic page orientation specified at the Page Setup dialog box.

Co-managers

One or more boxes that share responsibility for a group of subordinates. The highlighted boxes in the figure below are co-managers.



You can show the co-manager relationship with the co-manager style in the Styles menu. See "Creating co-managers," page 114.

Connecting lines

The lines that connect the various *boxes* in the chart.

Co-workers

Boxes with the same manager. Co-workers form a *group*.

Dotted-line relationship

A special reporting relationship between a single box in one group to its own manager or to the manager of a separate group. A dotted line usually indicates that the manager has some measure of authority over

the subordinate, but the exact nature of that authority isn't usually indicated in the chart. You can draw dotted-line relationships with the Connecting Line tool. See "Using the Connecting Line tool," page 158 for more information.

Group

All the boxes reporting to the same manager, excluding assistant boxes. The group is the basic building block of all Org Plus charts. It consists of *co-workers*.

Group style

The particular arrangement of *boxes* in a *group*. Separate groups can have different group styles. Group styles are located in the Styles menu. See "Changing group styles," page 111.

Label setup

The labels for the information you enter into the boxes in your chart, and the way those labels are arranged. Different boxes can have different label setups. See "Changing the label setup" on page 96 for more information.

Level

The topmost box in your chart is at level 1. The boxes directly reporting to it are at level 2. The boxes reporting to them are at level 3, and so on. The black boxes in Figure G-1 are at level 4.

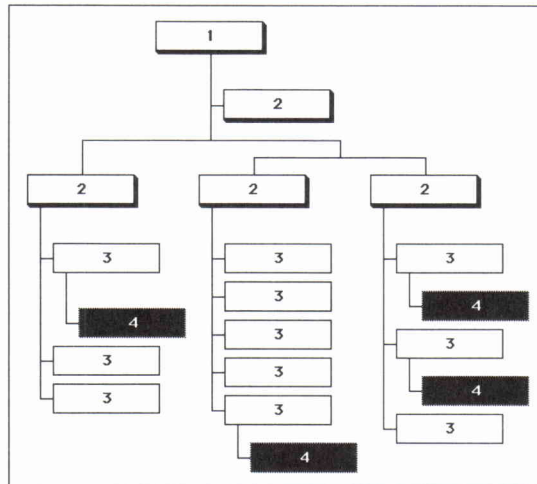


Figure G-1. Levels in a chart

Org Plus supports up to 50 levels in a chart.

Manager

A box that has other boxes — its *subordinates* — reporting to it.

Page lines

Lines that show you the location of margins, title areas, and page borders.

PICT

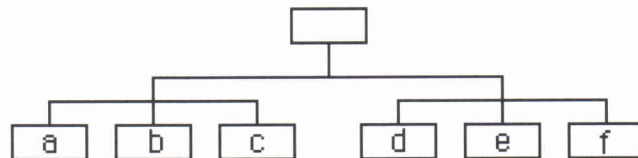
A standard file format for graphic images. Org Plus can copy PICT images from the Clipboard. It can also paste any visible portion of your chart to the Clipboard in PICT format. See “Pasting pictures into your chart,” page 165, and “Copying and pasting between applications,” page 228.

Stationery

A special type of chart containing a basic chart design. Stationery is like a pad of preprinted charts with empty boxes. When you open a stationery chart, you “tear off” a standard chart from the pad.

Subgroup

A grouping of boxes within a larger group. In the figure below, *a*, *b*, and *c* belong to the same subgroup; *d*, *e*, and *f* belong to a separate subgroup. All belong to the same *group* because they have the same manager.

**Subordinate**

A box that reports to a *manager* box.

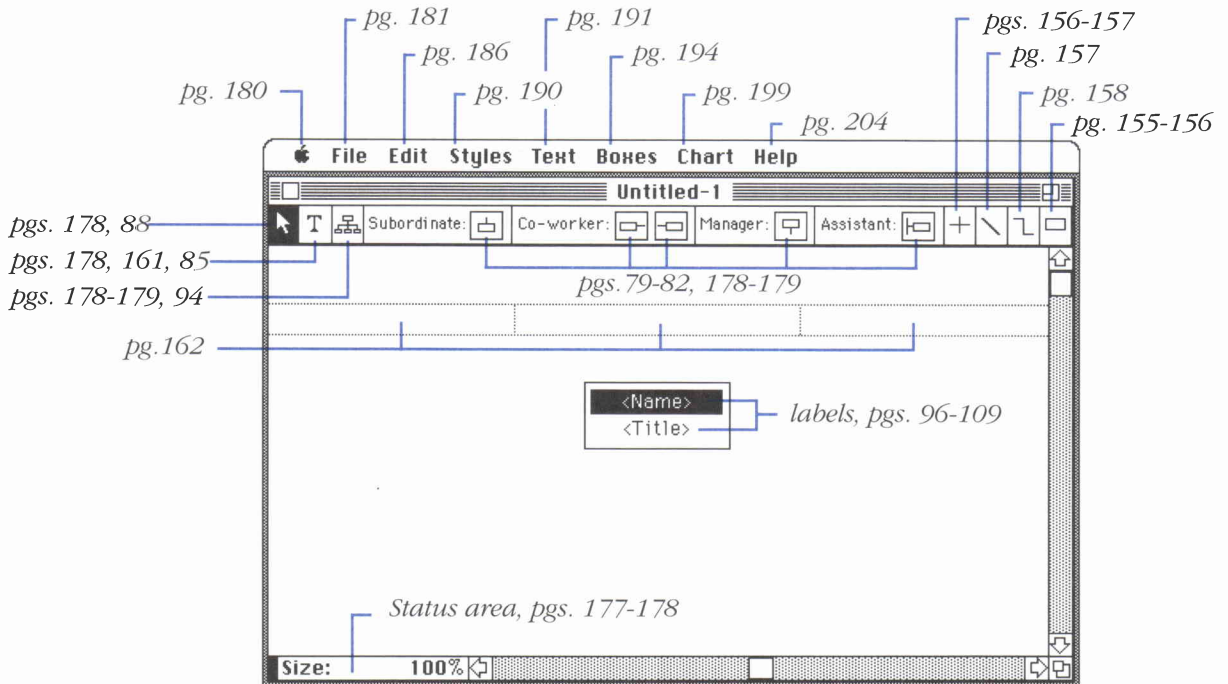
Topmost box

The topmost box in the chart. The head honcho. The big cheese.

Wrapping


























Allowing a phrase or sentence to split — or “wrap” — from one line to the next, as opposed to requiring it to fit on a single line. This paragraph is wrapped across three lines.

Picture Index



File		
pg. 181	New	⌘N
pg. 182	Open...	⌘O
pg. 183	Close	⌘W
<hr/>		
pg. 183	Save	⌘S
pg. 183	Save As...	
pg. 184	Save Stationery...	
pg. 184	Revert to Saved...	
<hr/>		
pg. 185	Page Setup...	
pg. 185	Print...	⌘P
<hr/>		
pg. 185	Quit	⌘Q

Edit		
pg. 186	Undo	⌘Z
<hr/>		
pg. 186	Cut	⌘H
pg. 186	Copy	⌘C
pg. 186	Copy Setup	
pg. 187	Paste	⌘V
pg. 187	Clear	⌘Y
<hr/>		
pg. 187	Select	▶
pg. 188	Select Levels...	
<hr/>		
pg. 188	Label Setup...	⌘L
<hr/>		
pg. 189	Preferences...	

Styles	
Group styles:	
pg. 111	
	
	
	
	
	
	
	
	
	
	
	
	
	
	
	
Assistant styles:	
pg. 113	
	
	
	
	
	
	
	
pg. 114	Co-manager style: 

Text	
pg. 191	Font ▶
pg. 191	Style ▶
<hr/>	
	6 point
	9
pg. 192	10
	✓ 12
	14
	18
pg. 192	Other ...
<hr/>	
pg. 192	Left
	Right
	✓ Center
<hr/>	
pg. 193	Name ▶
pg. 193	Word Wrap

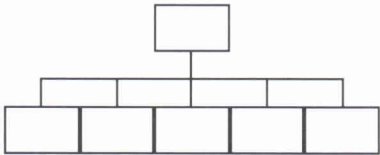
Bones	
<i>pg. 194</i>	Box Border ▶
<i>pg. 195</i>	Box Shadow ▶
<i>pg. 195</i>	Line Thickness ▶
<i>pg. 196</i>	Line Style ▶
<i>pg. 196</i>	Hide Box
<i>pg. 196</i>	Hide Branch
<i>pg. 197</i>	Spacing... ⌘D
<i>pg. 197</i>	✓ Auto Width
<i>pg. 198</i>	✓ Auto Height
<i>pg. 198</i>	Manual Size...

Chart	
<i>pg. 199</i>	Make Fit... ⌘M
<i>pg. 201</i>	Size to Window ⌘I
<i>pg. 201</i>	50% of Actual ⌘J
<i>pg. 201</i>	✓ Actual Size ⌘K
<i>pg. 202</i>	Show Edit Panel ⌘E
<i>pg. 202</i>	Show Page Lines
<i>pg. 203</i>	Hide Symbols
<i>pg. 203</i>	Show Draw Tools ⌘T
<i>pg. 203</i>	Center Up/Down
<i>pg. 203</i>	✓ Center Left/Right
<i>pg. 199</i>	✓ Untitled-1 ⌘1

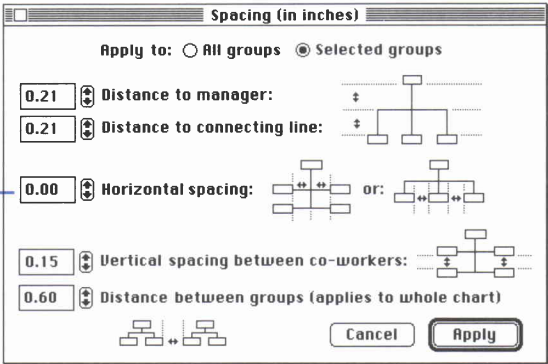
Help	<i>pgs. 204, 14</i>
Help Topics...	⌘H
Creating bones...	
Rearranging bones...	
Spacing bones...	
Sizing bones...	
Moving bones...	
Entering text...	
Rearranging text...	
Making it fit...	
Custom drawing...	
Using stationery...	
Time saving ideas...	

Continuous boxes 1

Eliminate space between boxes to create "continuous box" effects.

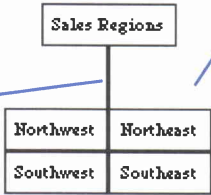
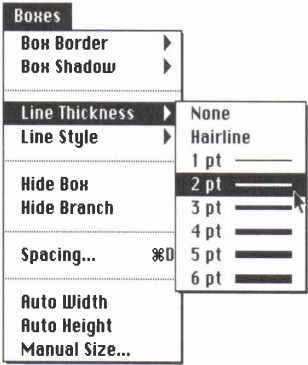


Select the group, then choose Spacing from the Boxes menu. Set horizontal spacing to 0.00" at the Spacing dialog box. See "Changing the distance between boxes," page 119, for more information.

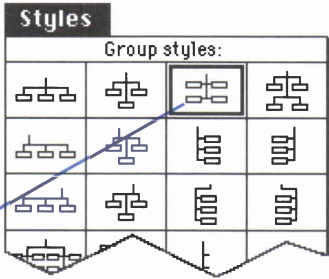


Continuous boxes 2

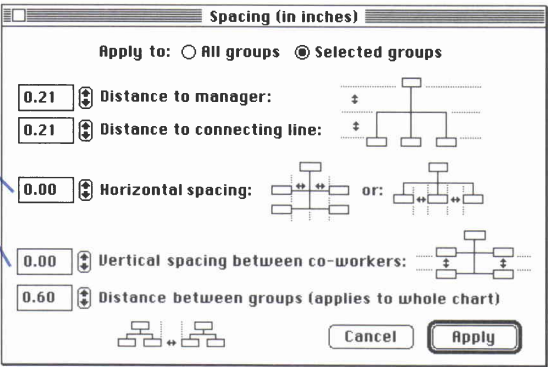
1. Select the connecting line and set it to 2 points (see "Changing line thickness and style," page 132)

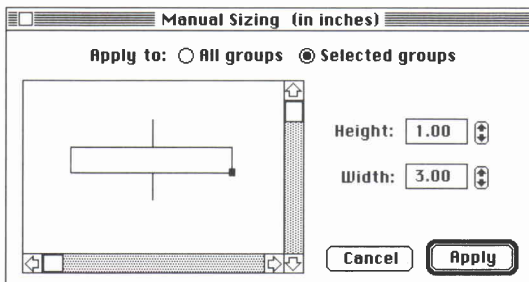


2. Select the group and choose the two column group style shown above (see "Changing group styles," page 111)

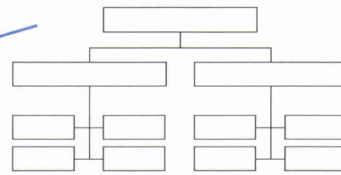


3. Select the group and choose Spacing from the Boxes menu. Set Horizontal and Vertical spacing to 0.00". See "Changing the distance between boxes," page 119, for more information.





Extra wide manager boxes



1. Select the topmost boxes, then choose *Manual Size* from the *Boxes* menu. Set the size for the topmost boxes at the *Manual Sizing* dialog box (see "Giving a box a fixed size," pages 124-125)

Modified co-manager style

The Co-manager style is usually drawn as shown in Figure B below. You can make it look like Figure C as follows:

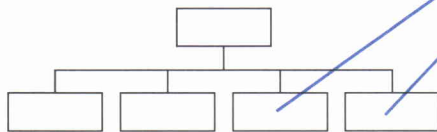


Figure A

1. Select the co-manager boxes

2. Choose the Co-manager style from the Styles menu

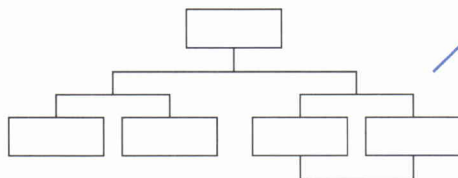
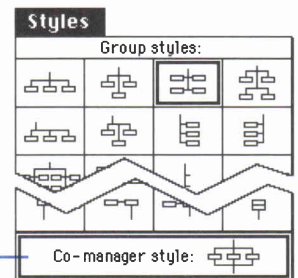


Figure B

3. Select all four subordinates, choose *Spacing* from the *Boxes* menu, and set the *Distance to manager* to 0.00" (see "Changing the distance between boxes," page 119)

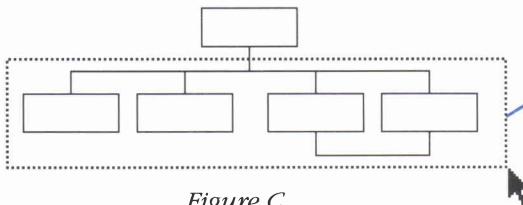


Figure C

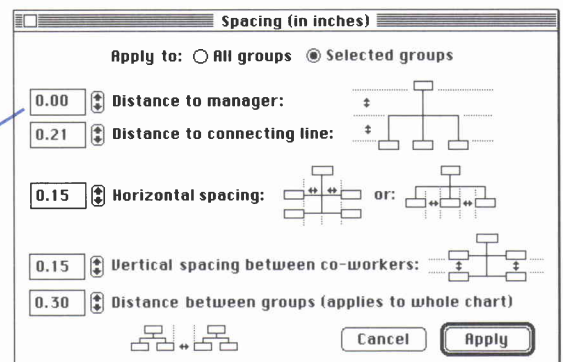


Figure A

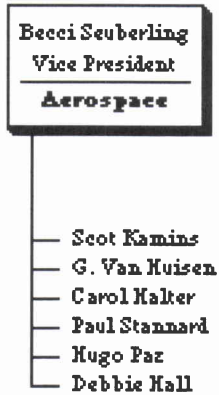


Figure B

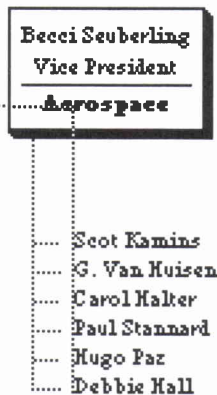


Figure C



Modified list style

To stack names below a box (Figure C), select Becci's subordinates and give them the list group style (Figure A). Select the connecting lines (Figure B) and give them a line thickness of None. Select Becci's subordinates, choose Spacing from the Boxes menu, and set the indicated distances to 0.00".

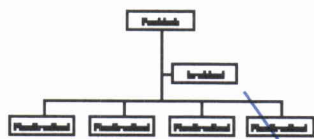
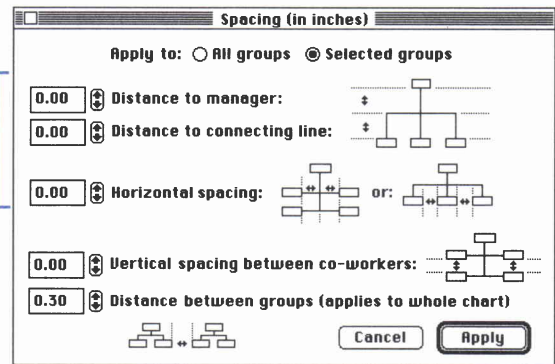
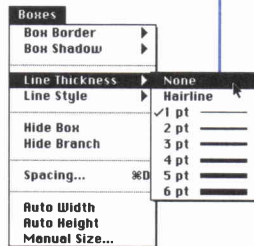
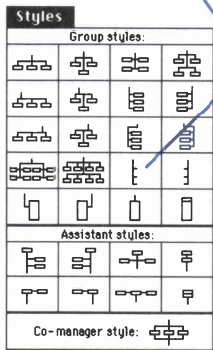


Figure A

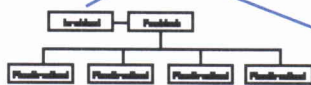
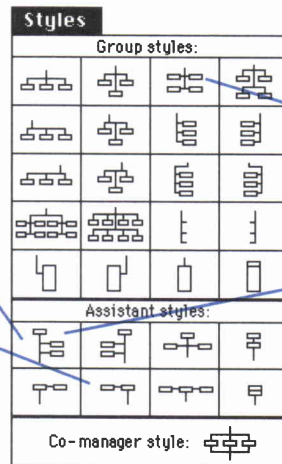


Figure B



Dual assistant styles

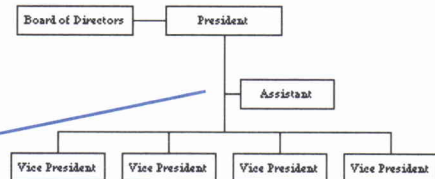


Figure C

You can create either Figure A or Figure B using Assistant styles. To create Figure C, however, you must use the 2-column sidearm group style and the sidearm right assistant style, as shown. That's because a manager's assistants can be drawn in one assistant style only.

Modified assistant style

Figure A shows an assistant style which doesn't appear in the Styles menu. The trick is to make B an assistant to A. Assistant A is drawn in the Sidearm Right style; Assistant B is drawn in the Top Right style. See "Changing assistant styles," page 113, for more information.

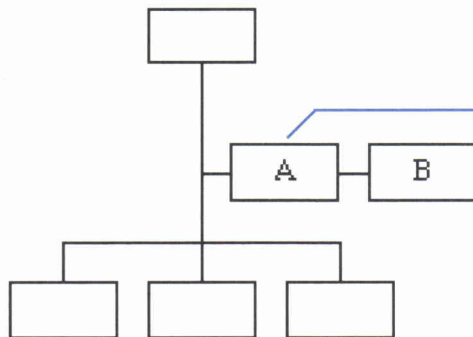


Figure A

Styles			
Group styles:			
Assistant styles:			
Co-manager style:			

Multiple topmost boxes

A chart can have as multiple topmost boxes, as shown in Figure D.

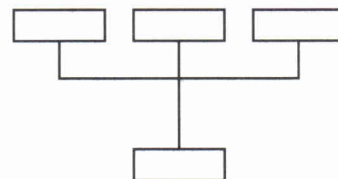


Figure D

1. Create multiple co-workers to the topmost position (see "Creating and deleting boxes," page 79)

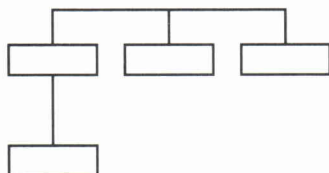


Figure A

2. Select the topmost group and apply the co-manager style to them (Figure B)

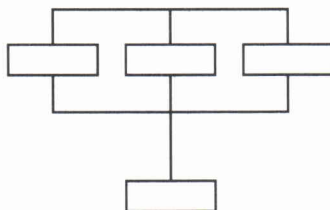


Figure B

3. Select the topmost lines and choose None from the Line Thickness submenu (Figure C)

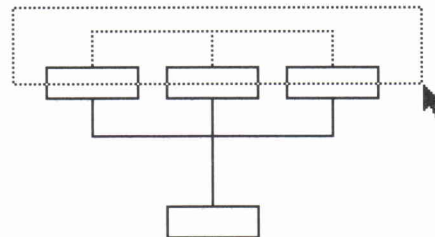


Figure C

Employees listed by function

The effect shown in Figure A can be created by creating two manager boxes containing the department name only, both of them reporting to Chris Phillips, then applying the indicated boxed group style to their subordinates. See "Creating and deleting boxes," page 79, and "Changing the label setup," page 96.

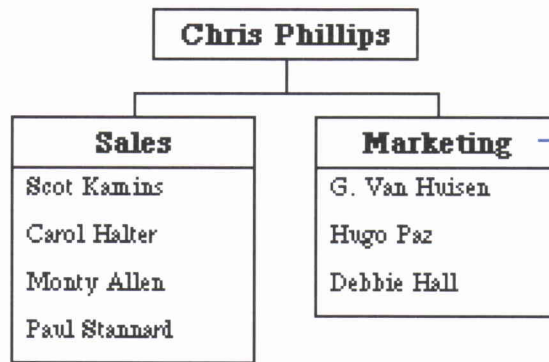
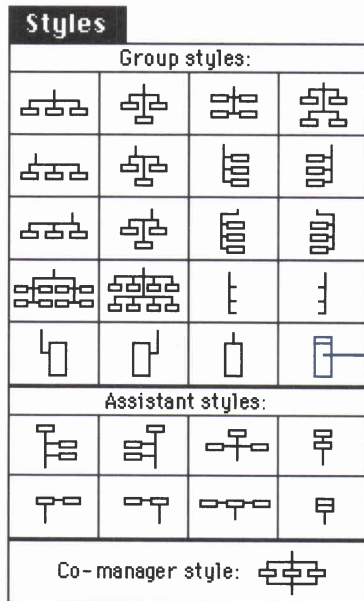
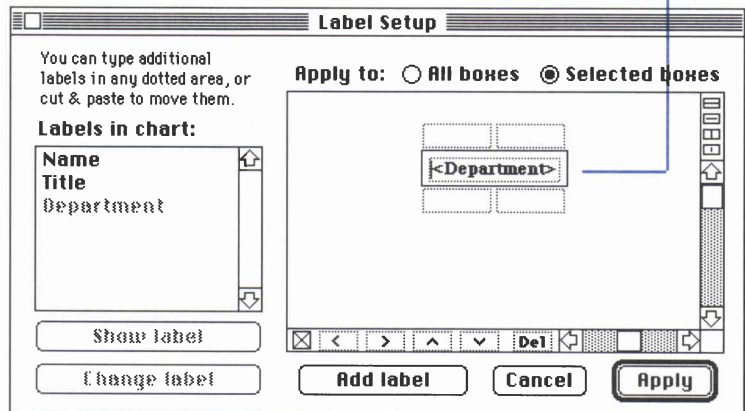


Figure A



INDEX

A

- Abbreviating names, 143
 - to save space, 136
- About Org Plus command, 180
- Actual Size command, 93-94, 201
- Adding
 - annotations, 161, 47
 - boxes, 80-83
 - labels (in Tutorial), 43-44
 - subordinates, 79-82
- Adjusting connecting lines, 159
- Administrative assistants. *See* Assistant
- Advisory-level positions. *See* Assistant
- Aligning
 - text, 128
 - titles, 162-163
- All Boxes command, 187
- Angle brackets, 100
- Annotations
 - creating, 163-164
 - defined, 161, 229
 - miscellaneous text, 163-164
 - standard title areas, 162-163, 47
 - in Tutorial, 47-49
- Apple menu, 180
- Art of charting, 207-209
- ASCII, 224
- Assistants
 - converting from, 82
 - converting to, 82
 - creating, 79, 81
 - defined, 113, 229
 - example of creating, 81
 - in Tutorial, 25-26
 - types of, 113
- Assistant box tool, 25, 179
- Assistant styles, 2, 113, 190
- Attach boxes, 26, 116
- Attach chart
 - cutting and pasting between charts, 145-147

- Auto Height command, 123, 198
- Auto Width command, 123, 197

Automatic

- box sizing, 123
- formatting, 2
- restoring, 126

Automatic sizing

- defined, 229
- changing, 123-125
- restoring, 126

B

- Batch printing, 166
- Blank rows. *See* Creating additional label areas
- Board of directors, 238
- Bold. *See also* Text
 - example of, 130
 - in Tutorial, 46
- Book of charts, 148
 - defined, 229
- Border
 - box, 132, 194-195
 - chart, 155
- Boss. *See* Topmost box
- Box Border command, 132, 194
- Box Shadow command, 132, 195
- Box tools. *See* Tools
- Boxes
 - adding, 79-82
 - around text annotation areas, 164
 - around the chart, 155
 - assistant, 229, 79
 - border of, 132
 - change style in Tutorial, 40-42
 - converting from one type to another, 82
 - creating, 79-82
 - delete, 84
 - distance between, 119-122
 - dragging, 115-116
 - drawing manually, 155-156

- example of creating, 1, 81
- height of, 123-126, 198
- hidden, 149-150
- justifying text in, 128
- lines in, 106
- making larger, 123-125
- making smaller, 124-125
- margins, 107
- maximum number of, 219
- minimum size of, 124-125
- moving
 - between charts, 145-148
 - within a chart, 115-118
 - without subordinates, 116
- multiple names in. *See* Group styles
- new, 80-83
- rearranging, 110-114
- replacing contents of, 118
- selecting all, 92
- selecting multiple, 89
- shadows of, 132
- showing, 149-151
- size of, 123-126
- style, 194-195
- text in, 84-86, 127-131
- topmost, 232, 24
- in Tutorial, 25-31
 - assistant, 25
 - co-worker, 28
 - creating, 25-30
 - deleting, 34
 - enlarging, 59
 - moving, 54-57
 - subordinate, 26-30
- types of, 194-195
- width of, 123-126, 197

Branch

- defined, 229
- hiding, 150-151
- moving, 115-116
- selecting, 187
- showing, 150-151
- symbol, 150-151

C

Capacity. *See* Limits

Center (text) command, 128, 192

Center Left/Right command, 118, 203

Center Up/Down command, 118, 203

Centering

- charts, 118
- titles, 162-163

CEO. *See* Topmost box

Chairman. *See* Topmost box

Change Label dialog box, 107

Changing

- assistant styles, 113
- box borders and shadows, 132
 - in Tutorial, 40-42
- box sizes, 123-126
- boxes. *See* Moving boxes
- connecting line thickness and style, 132
- distance between boxes, 119-122
- fonts, 128
- group styles, 64-65, 111, 30-32
- label setup, 58-59, 96-109, 130-131
 - in Tutorial, 43-46, 58-59
- labels, 107-108
- line length, 120
- line thickness & style, 132
- margins of chart, 172-173
- margins within a box, 107
- page orientation, 66
- people's name formats, 129
- preset options, 169-170
- subgroup styles, 112
- text 128, 130-131
 - in Tutorial, 31-33, 40-42, 46, 64-65

Chart

- annotating, 161-164
 - in Tutorial, 47-49
- centering on the page, 118
- combining, 145-148
- creating books of, 148
- creating from scratch, 74-75
- creating with stationery, 78-79
- defined, 229
- editing text in, 85
- height. *See* Viewing your chart

- making more compact, 132-144
 - by changing box sizes, 123-126
- making narrower, 134-136
- making shorter, 137-138
- margins, 172-173
- maximum reduction of size, 141-142
- moving, 118
- moving around in, 93-95
- moving boxes between, 145-148
- multiple, 145-148
- number of pages in, 139
- opening, 181, (in tutorial) 38-39
- pad of charts. *See* Stationery
- page area, 230
- preview, 93-96
- printing, 166
- reducing size of, 132-144
 - (in Tutorial), 63-70
- samples, 12-13
- saving a, 183
- starting, 74-79
- stationery, 78-79
- titles, 162
- trading off between width and height, 132-144
- updating (in Tutorial), 51-70
- width. *See* Viewing your chart
- window, 177-178

Chart level

- defined, 231
- maximum in a chart, 219
- selecting boxes at the same level, 91-92

Chart-making tips, 207-209

Chart page area, 152

Chart titles, 162-163

Clear command, 187

Clipboard

- cut and paste between applications, 165, 228
- cut and paste between charts, 145
- cut and paste to move boxes, 115

Close command, 183

Colleague. *See* Co-worker

Co-manager style, 114

Co-managers, 114, 190

- defined, 230

Combining separate pieces of information, 100

Combining subgroups, 112-113

Command, choosing from a submenu, 41

Command-H (for "Help"), 14

Command-? (for "help pointer"), 15

Commands

- 50% of Actual, 201
- Actual Size, 201
- Auto Height, 198
- Auto Width, 197
- Box Border, 194
- Box Shadow, 195
- Center, 192
- Center Left/Right, 203
- Center Up/Down, 203
- Clear, 187
- Close, 183
- Copy, 186
- Copy Setup, 186-187
- Cut, 186
- Font, 191
- Label Setup, 188-189
 - in Tutorial, 43
- Left, 192
- Line Style, 196
- Line Thickness, 195
- Make Fit, 139-141
 - in Tutorial, 67-70
- Manual Size, 198
- Name, 193
- New, 181
- Open, 182
- Other, 192
- Page Setup, 185
- Paste, 187
- Points. *See* Text sizes
- Preferences, 189
- Print, 185
- Quit, 185
- Revert to Saved, 184
- Right, 192
- Save, 183
- Save As, 183
- Save Stationery, 184
- Select, 187
- Select Levels, 188

- Show/Hide
 - Box, 196
 - Branch, 196
 - Draw Tools, 203
 - Edit Panel, 202
 - Page Lines, 202
 - Symbols, 203
- Size-Window, 201
 - in Tutorial, 30
- Spacing, 197
- Style, 191
- Undo, 186
- Untitled (as name of chart), 199
- Word Wrap, 193
- Company logo, 4, 165, 228
- Computer requirements, 7-8, 219
- Concatenating text. *See* Merging
- Condense chart. *See* Fitting chart on one page
- Connecting Line tool, 158
- Connecting lines
 - adjusting, 159-160
 - changing length of, 120
 - drawing, 158-160
 - defined, 230
 - showing/hiding, 151
 - thickness and style, 132
- Converting boxes from one type-to another, 82
- Copy command, 186
- Copy machine
 - reducing chart image on, 142
- Copy protection, 9
- Copy Setup command, 186-187
- Copying
 - between applications, 228
 - between charts, 145-146
 - label setup to other boxes, 109
 - Org Plus diskettes, 9, 11
- Corners of boxes
 - text on. *See* Changing Label Setup
- Co-worker
 - box tool (in Tutorial), 28
 - creating, 80
 - defined, 230
- Co-worker After tool, 178
- Co-worker Before tool, 178

- Creating
 - additional label areas, 100-101
 - any type of box, 80-81
 - assistant box
 - in Tutorial, 25
 - books of charts, 148
 - boxes, 79, 21
 - alternative ways, 83
 - in Tutorial, 25-31
 - multiple at the same time, 81-82
 - chart, 74-78, 1, 22
 - faster and easier, 211-213
 - from scratch, 74-75
 - tips and suggestions, 207-209
 - in Tutorial, 21-72
 - using a predefined label setup, 75-76
 - using stationery, 78-79
 - with your own label setup, 76-77
 - co-managers, 114, 190
 - co-worker boxes (in Tutorial), 28
 - custom group style, 149
 - departments. *See* Subgroup
 - dividing lines, 106
 - label areas, 100
 - label setup, 76-77
 - labels, 100
 - lines, 195-196, 21
 - stationery, 167-168
 - subgroups, 111-112
 - in Tutorial, 61-63
 - subordinate boxes (in Tutorial), 26-30
 - text areas for annotations, 163-164
 - titles, 49, 162-163
 - workgroups. *See* Group
- Cursor keys. *See* Keyboard and mouse shortcuts
- Custom group styles, 149
- Custom touches, 4
- Customer assistance. *See* Help
- Customizing Org Plus, 167-173
- Cut and paste
 - between charts, 145-148
 - boxes, 117, 56
 - labels. *See* Moving Labels
- Cut command, 186

D

Deleting

- boxes, 80, 84
 - in Tutorial, 22, 34
- label areas, 102
- labels, 77, 107-108
- lines, 22

Diagonal line tool, 157

Dialog box

- Change Label, 107
- Label Setup, 98
- Make Fit, 139
- Make Fit Options, 142
- Match Information, 146
- New Chart, 75, 23
- Personalized Copy, 17
- Preferences, 170-171
- Select Levels, 91
- Spacing, 119
- Startup, 74, 18, 23

Disk

- copying Org Plus from, 9-13
- what should be on Org Plus, 12

Disk drive, 10

Distance

- between boxes, 119-122
- between group and manager
 - increase to save space, 135

Divider buttons, 106-107, 45

Dotted line relationship

- defined, 230

Dragging

- boxes, 115-116
- changing distances between boxes by, 120-122
- groups down, 135
- margins, 172-173
- in Tutorial, 54-56
- multiple labels, 147

Drawing. *See also* Tools

- boxes manually, 155-156
- displaying the drawing tools, 154
- lines manually, 156-160

E

Edit menu, 186-189

Edit panel, 212-213, 86-87

Editing

- existing information, 85
- information not shown in the chart, 86
- labels, 107
- people's names, 86
- shortcuts, 85
- text, 85

Employee. *See* Boxes

Enlarging

- boxes, 124-125, 100-101
- in Tutorial, 59
- text, 128

Entering

- new information, 84, 24
- people's names, 86, 108-109
- in Tutorial, 47, 59-60

Erasing. *See* Deleting

Examples of organization charts, 12-13

Exchanging data

- with Org Plus for IBM, 221-224
- with other applications as text files, 224-227

Exiting Org Plus, 185, 36

Export data from Org Plus

- as a text document, 227
- to Org Plus for IBM, 223
- with the clipboard, 228

F

50% of Actual command, 93-94, 201

Field names. *See* Label Setup

File menu, 181-185

Fired employee. *See* Deleting boxes

Fitting chart on one page, 132-144

Fixed box size, 124 -125

Floppy disks

- installation on, 10

Font command, 191

Fonts

- effect on chart size, 138
- changing style and size, 128, 144
- selecting, 128

Footnotes. *See* Annotations
Formatting people's names, 108, 129

G

Geneva 9, 10, and 12 point fonts, 21, 69

Getting

- charts. *See* Opening charts
- help, 14
- on-line help, 14
- started, 7

Group styles

- changing, 31, 111
- defined, 231
- effect on the size of your chart, 134, 137
- for subgroups, 111
- selecting, 111

Groups

- adding co-workers to, 30
- adding to chart, 79-84
- creating, 79-84
- defined, 231
- moving to or between, 93-95
- offsetting, 134-135
- rearranging, 110-111
- selecting, 90, 92, 187
- in Tutorial, 31-33, 64-65

Guidelines for chart making, 207-209

H

Hairline

- box borders, 132
- defined, 132
- lines, 195

Hard disk

- installing on, 9

Hardware requirements, 7-8, 219

Height

- of boxes, 123-126
- of chart. *See* Viewing your chart

Help

- Banner Blue Technical Support, 7
- customer assistance, 15
- Hot line, 7
- menu, 14-15

- messages, 15

- on-line help, 14, 204

- installing on floppy disk, 12

- using, 14-15

Help Topics command, 14, 204

Hidden boxes, 149-150

Hidden information in your chart, 86

Hide Box command, 149, 196

Hide Branch command, 150, 196

Hide Draw Tools command, 203

Hide Edit Panel command, 202

Hide Label, 104

Hide Page Lines command, 152, 202

Hide Symbols command, 203

Hiding

- boxes, 149-150

- branches, 150-151

- connecting lines, 151

- draw tools, 154

- edit panel, 212, 86-87

- labels, 104

- page lines, 152

- symbols, 203

I

IBM documents with Org Plus, 221-224

Importing data into Org Plus

- as a text document, 224-227

- from Org Plus for IBM, 221-224

- with the clipboard, 228

Information

- editing, 85

- entering, 84

- in Tutorial, 47, 59-60

- Seeing and editing hidden*, 86

Inserting. *See also* Adding

- boxes, 80-83

- managers, 82

Installing Org Plus

- on hard disk, 9-10

- on 800K disks, 8, 10-12

Introduction to Org Plus, 1

Italics. *See also* Text

- example of, 130

J

Joining. *See* Merging

Justifying text. *See* Aligning Text

K

Keyboard shortcuts, 92, 95, 215-218

- creating boxes, 215

- entering information, 215

- file operations, 218

- making dialog box selections, 217

- modifier keys with the mouse, 218

- selecting/editing boxes, 217

- viewing your chart, 216

L

Label area buttons, 101

Label areas, 43-44, 98, 100-101

- deleting, 102

Label list, 98

Label Setup

- changing, 96-109, 130-131

- copying, 109

- create your own, 76-77

- defined, 231, 96, 43, 75

- in Tutorial, 43-46, 58-59

- use a predefined, 75

- with multiple columns or rows, 101

Label Setup command, 188-189

Label Setup dialog box, 98, 43

Labels

- adding, 100, 96, 44, 76-77

- creating, 100, 96, 76-77

- customizing, 107-108, 130-131

- deleting, 108, 77

- dragging multiple, 147

- moving, 102-103

- moving hidden labels back into setup, 104

- predefined, 75-76

- removing from label setup, 104

- renaming, 108

- showing/hiding, 104, 109

- in Tutorial, 43-44

Landscape. *See* Page Setup command

Laser printer margins, 173

Learning Org Plus, 21-72

Left (justify text) command, 128, 192

Legend, 4, 163-164

Length

- of chart (height). *See* Viewing your chart

- of information items, 219

- of lines, 119-120

Level

- defined, 231

- selecting, 91

Levels

- chart. *See* Chart level

- maximum number of, 219

Limits, program, 219

Line Style command, 132, 192

Line Thickness command, 132, 151, 195

Lines

- connecting, 120

- custom drawn, 156-160

- dividing a box, 106-107

- drawing, 79, 81 156-160

- in a box, 106-107

- none, 151

- page, 152

- showing/hiding, 151

- showing/hiding page, 152

- thickness and style, 132

Logo, 165

M

Macintosh Plus, 7

Macintosh SE, 7

Macintosh II, 7

Magnifier, 94

- in Tutorial, 40

Make Fit command, 132, 139-141, 67-70, 199-200

- in Tutorial, 67-70

- using, 139-144

Make Fit dialog box, 139

Make Fit options, 142-144

Make Fit Options dialog box, 142

Making

- boxes as small as possible, 124

- boxes equal height, 123

- boxes equal width, 123

- boxes narrower, 124
- boxes shorter, 124
- chart compact, 132-144
- chart fit on one page (in Tutorial), 63-72
- chart narrower, 134-136
- chart shorter, 137-138
- Manager. *See also* Topmost box
 - defined, 231
 - inserting, 82
 - selecting, 187
 - two or more for one department, 114
 - two or more topmost, 114
- Manager box tool, 179
- Manual Size command, 124-125, 198
- Manual (User's Guide) summary, 5
- Margins, changing
 - in a box, 107
 - in a chart, 144, 172-173, 31, 68
- Match information, 146-148
- Match Information dialog box, 146
- Matching
 - labels between charts, 146-148
- Maximum
 - box size, 219
 - boxes per chart, 219
 - boxes per group, 219
 - characters per box, 219
 - characters per items of information, 219
 - chart size, 219
 - charts open at one time, 219
 - number of labels, 219
 - number of levels, 219
 - reduction of chart size, 141
- Memory requirements, 219
- Menu commands. *See* Commands
- Menus
 - Apple, 180
 - Boxes, 194-198
 - Charts, 199-203
 - Edit, 186-189
 - File, 181-185
 - Help, 204
 - Styles, 190
 - Text, 191-193
- Merging

- subgroups, 112-113
- text values, 100
- Minimum
 - box size, 124-125, 219
 - margins, 144, 68
 - requirements for using Org Plus, 7, 219
- Moving
 - around chart, 95, 93
 - between groups, 93-95
 - boxes
 - within a chart, 115-118
 - between charts, 145-148
 - branches, 115-116
 - employees. *See* Moving boxes
 - hidden labels back into setup, 104
 - information between Org Plus and other programs, 221-228
 - keyboard shortcuts for, 215-218
 - labels, 102-103
 - left, right, up, or down, 95
 - positions. *See* Moving boxes
 - scattered boxes under a single manager, 117
 - text, 129
 - the chart, 118
 - in Tutorial, 54-57
- Multiple
 - charts, 145-148
 - columns or rows in label setups, 101
 - topmost managers, 114

N

- Name command, 108, 193
- Name label, 108, 24
- Names
 - abbreviating, 143
 - entering, 86
 - formatting, 108-109, 129
- New Chart dialog box, 75
- New command, 181
- New Labels Setup dialog box, 76
- None box border, 194
- None box shadow, 195
- None line thickness, 195

Notes. *See* Annotations

O

- On-line help, 14-15, 12, 180, 204
 - See also* Help
- Open command, 182
- Opening
 - charts, 182, 38-39
 - Org Plus for IBM documents, 221-222
 - stationery, 168
 - text documents, 224-227
- Operating limitations, 219
- Org Plus
 - help, 12-13
 - Help & Learning disk, 10, 12
 - icons, 12-13
 - installing, 7-1
 - limits, 219
 - Program disk, 9, 10, 11
 - Readme, 12-13
 - starting, 17
 - version 1.0, 12-13
 - working copy of, 9
- Organization chart
 - examples, 12-13
- Orientation
 - changing (in Tutorial), 66
- Other (text sizes) command, 192
- Overlap printing, 170-171
- Overlapping boxes, 159

P

- Package contents, 8
- Page border line, 30
- Page breaks. *See* Page lines
- Page lines
 - defined, 232
 - non-printing, 152
 - showing/hiding, 152
- Page orientation
 - changing (in Tutorial), 66
- Page Setup command, 185
 - to reduce chart size, 141-142
- Page Setup dialog box, 185
- Paper
 - setting size. *See* Page Setup command

- Paste command, 187
- Pasting pictures into your chart, 165
- Peer. *See* Co-worker
- People's names
 - entering, 86
 - formatting, 108, 129
- Percent of actual size, 94, 30
- Perpendicular line tool, 156-157,
- Personalize Org Plus, 17
- PICT images
 - defined, 232
 - copying to clipboard, 228
 - pasting into Org Plus, 165, 228
- Portrait orientation. *See* Page Setup command
- Position. *See* Boxes
- Predefined label setup, 75
- Preferences command, 189
- Preferences dialog box, 170-171
- Preset options
 - changing, 169-171
 - Preferences dialog box, 170-171
- President. *See* Topmost box
- Preview chart, 152
- Print command, 185
- Printing

- charts, 166
- from the finder, 166
- labels, 109
- landscape. *See* Page Setup command
- multiple charts, 166
- orientation. *See* Page Setup command
- overlap between pages, 170-171
- page lines never print, 152
- portrait. *See* Page Setup command
- preview chart before, 152, 203

Q

- Queuing documents. *See* Printing, multiple charts
- Quit command, 185

R

- RAM. *See* Memory
- Readme, 13
- Rearranging. *See also* Moving boxes

- boxes, 110-114
 - information. *See* Label Setup
- Rectangle tool
 - using, 155-156
- Reduce/Enlarge tool, 94, 179
 - in Tutorial, 40
- Reducing
 - boxes, 124
 - chart image on a copy machine, 142
 - chart image on a printer
 - chart size, 132-144
 - in Tutorial, 63-70
 - text size, 144
- Registration card, 8
- Removing
 - box, line, or other unwanted object, 89
 - dividing lines, 106
 - labels from setup, 104
 - positions. *See* Deleting boxes
- Renaming labels, 107-108
- Reorganization. *See* Moving boxes
 - See also* Deleting boxes
- Replacing box contents, 118
- Requirements for Org Plus, 7-8
- Retrieving charts. *See* Opening charts
- Revert to Saved command, 184
- Right (justify text) command, 128, 192

S

- Sample charts, 12-13
- Save As command, 183-184
- Save command, 183
- Save space, 132-144
 - by changing box sizes, 123-126
- Save Stationery command, 184
- Saving
 - as Org Plus for IBM, 223-224
 - as stationery, 184
 - as text document, 227
 - your chart, 183
- Secretaries. *See* Assistant
- Seeing any box in your chart, 94
- Seeing your chart at different sizes, 93
- Select command, 187
- Select Levels command, 91-92, 188

- Select Levels dialog box, 91

Selecting

- a box, 149
- a branch, 90
- a group, 90
- a single object, 89
- all boxes, 88, 92
- all boxes at the same level, 91
- all objects of the same type, 90
- keyboard shortcuts for, 92
- Make Fit options, 142-144
- multiple objects, 89
- Selection Arrow tool, 178
- Shadows for boxes, 132
- Shift click (defined), 88
- Shifting horizontal groups-save space, 134-135
- Shortcuts

- creating boxes, 215
- editing, 85
- entering information, 215, 212
- file operations, 218
- keyboard and mouse, 215-218
- making charts faster and easier, 211-213
- making dialog box selections, 217
- modifier keys with the mouse, 218
- moving around in your chart, 95
- selecting/editing boxes, 92, 217
- viewing your chart, 216

- Show Box command, 196
- Show Branch command, 150-151, 196
- Show Draw Tools command, 154, 203
- Show Edit Panel command, 202, 212
- Show Label command, 104
- Show Page Lines command, 152, 202
- Show Symbols command, 203

Showing

- boxes, 149-150
- branches, 150-151
- connecting lines, 151
- draw tools, 154
- edit panel, 212, 86-87, 202
- labels, 104, 109
- page lines, 152
- symbols, 203
- Shrinking. *See* Fitting chart on one page

- Siblings. *See* Co-worker
 - Sideways printing. *See* Page Setup command
 - Size
 - limits, 219
 - of annotation areas, 163-164
 - of boxes, 123-126
 - minimum, 124
 - of chart. *See* Viewing your chart
 - of paper. *See* Page Setup command
 - of text, 128, 144
 - in Tutorial, 48, 68
 - Size to Window command, 93-94, 201
 - in Tutorial, 30
 - Skills required, 7
 - for tutorial, 21
 - Skip a level. *See* Hidden boxes
 - Sophisticated charting, 207-209
 - Spacing command, 119-120, 197
 - Spacing dialog box, 119
 - Special effects
 - through manual drawing, 153-160
 - through showing and hiding, 149-152
 - Specifications, 219
 - Splitting text across lines, 128-129
 - Staff Level. *See* Assistant
 - Starting
 - a chart, 74-77, (in Tutorial) 22-24
 - Org Plus, 17-18
 - stationery, 78-79
 - Startup dialog box, 18, 74
 - Stationery
 - books of charts, 148
 - creating, 167-168
 - defined, 232
 - folder, 13
 - multiple charts, 148
 - opening, 168
 - saving as, 183-184
 - using, 78-79
 - Status area, 177-178
 - Style command, 191
 - Styles, changing. *See* Changing
 - Styles menu, 190
 - Subgroup
 - changing styles, 112
 - creating, 111-112
 - defined, 232
 - merging, 112-113
 - in Tutorial, 61-63
 - Submenus
 - Box Border, 194
 - Box Shadow, 195
 - Font, 191
 - Line Thickness, 195
 - Line Style, 196
 - making choices from, 41
 - Name, 193
 - Select, 187
 - Style, 191
 - Subordinate box tool, 178, 179
 - in Tutorial, 26-30
 - Subordinates
 - adding. *See* Adding boxes
 - defined, 232
 - maximum number of, 219
 - of cut boxes automatically promoted, 117
 - selecting, 187
 - Summary of manual, 5
 - Symbol
 - branch, 150-151
 - show command, 203
 - System requirements, 219, 7-8
- ## T
- Teach Text, 12-13
 - Technical support, 15, 7
 - Telephone at Banner Blue, 7
 - Template. *See* Stationery
 - Terminate employee. *See* Deleting boxes
 - Text
 - abbreviating. *See* Abbreviating names
 - alignment, 128
 - bold, 128
 - changing, 128, 131
 - documents, 224-227
 - editing, 85
 - entering, 84-85
 - labels. *See* Label Setup
 - menu, 193, 46
 - moving, 102

- on corners of box. *See* Label Setup
- size in Tutorial, 48, 68
- sizes, 191-192
- style in Tutorial, 46
- wrapping across lines, 128-129, 143
- Text tool, 178
- Time saving measures, 211-213
- Tips on making charts, 207-209
- Titles and Title areas, 162-163, 24
- Tool palette, 178-179
- Tools
 - Assistant box, 179
 - Connecting line, 158-160
 - Co-worker After box, 179
 - Co-worker Before box, 179
 - Diagonal line, 157
 - drawing, 154-160
 - Manager box, 179
 - Perpendicular line, 156-157
 - Rectangle, 155-156
 - Reduce/Enlarge, 94
 - Selection Arrow, 178
 - Subordinate box, 179
 - Text, 178
- Topmost box, 91, 232
- Trading off between chart width and height, 132
- Tree diagram, 1
- Troubleshooting, 15
- Tutorial
 - adding label to setup, 43-44
 - annotating the chart, 47-49
 - change box style, 40-42
 - changing label setup, 43-46, 58-59
 - changing page orientation, 66
 - choosing text size, 48, 68
 - choosing text style, 46
 - creating a chart, 21-72
 - creating assistant boxes, 25-26
 - creating boxes, 25-30
 - creating co-worker boxes, 28
 - creating subgroups, 61-63
 - creating subordinate boxes, 26-27, 29
 - delete boxes, 34
 - enlarging boxes, 59
 - entering information, 47, 59-60

- magnify the chart, 40
- Make Fit command, 67-70
- moving boxes, 54-57
- reducing chart size, 63-70
- Size to Window command, 30
- updating a chart, 51-71
- Two 800K drive system
 - installing on, 10-13
 - starting, 17-18
- Two or more managers for one department.
 - See* Co-managers

U

- Underlining. *See* Changing text
- Undo command, 186
- Untitled command (as name of chart), 199
- Updates, 8
- Updating, 3
 - in Tutorial, 51-71
- Upgrades, 8
- Using
 - Connecting line tool, 158-160
 - Diagonal line tool, 157
 - Magnifier, 94
 - Make Fit command, 139-144
 - Perpendicular line tool, 156-157
 - Rectangle tool, 155-156
 - Reduce/Enlarge tool, 94
 - Spacing dialog box, 119-120
 - Stationery, 78-79
- Using Org Plus, 73
- Using Org Plus with other applications, 221-228
 - copying/pasting between applications, 228
 - opening Org Plus for IBM files, 221-222
 - opening text documents (importing), 224-227
 - saving as Org Plus for IBM file, 223-224
 - saving as text documents, 227

V

- Viewing your chart, 93-95, 216

W

- Width
 - of boxes, 123-126

of chart. *See* Viewing your chart
Window, Chart, 177-178
Word Wrap command, 128-129, 193
Work group. *See* Group
Working copy of Org Plus, 9
Wrapping text across lines, 128-129, 143, 232
Write protect tabs, 9

Z

Zoom box, 196

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Fast chart creation — no drawing required

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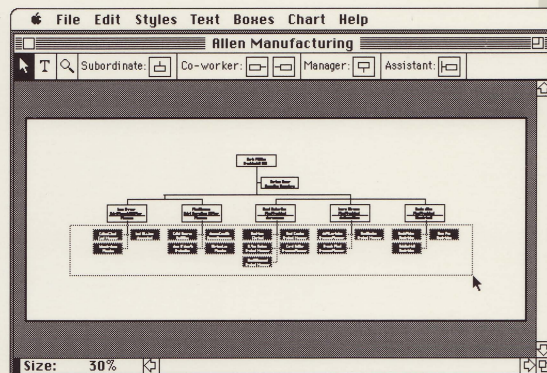
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Add your company logo, type notations anywhere in your chart, or change the way Org Plus draws something. A complete set of drawing tools lets you get any special effects you can't get automatically.

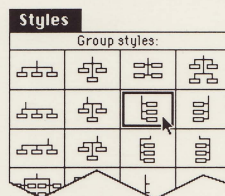
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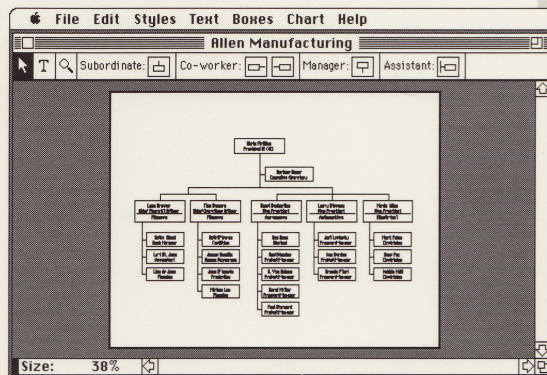
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1. Select the boxes you want to reformat.

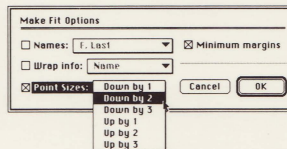


2. Choose the style you want from the Styles menu.



3. Org Plus redraws your chart automatically.

4. Fit your chart on a desired number of pages with the Make Fit command. Org Plus automatically applies a number of space-saving features.



ORG PLUS™

For Macintosh®

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Macintosh Plus (with 2 drives), SE, and Macintosh II series computers. Requires System v4.1 and Finder v6.0. MultiFinder compatible.

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