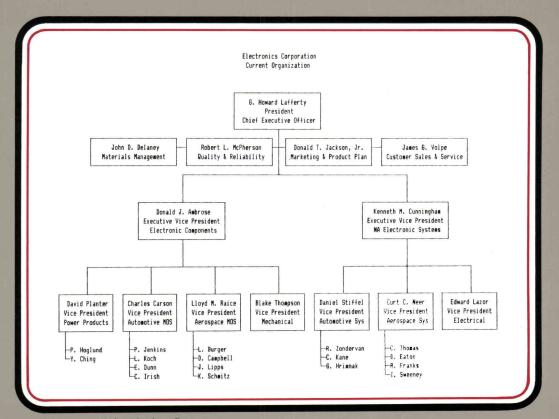


Org makes Organization Charts.

You enter the names. Org automatically formats and draws with perfect spacing.



Actual printed chart (reduced).



Program and Documentation by Kenneth Lafferty Hess

Dedicated to Connie Irish-Hess

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First Edition (June 1985)

Changes are periodically made to the information contained in this guide. These changes will be incorporated in new editions of the guide.

Your questions and comments about the program and documentation are welcome.

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1

Introduction To Org

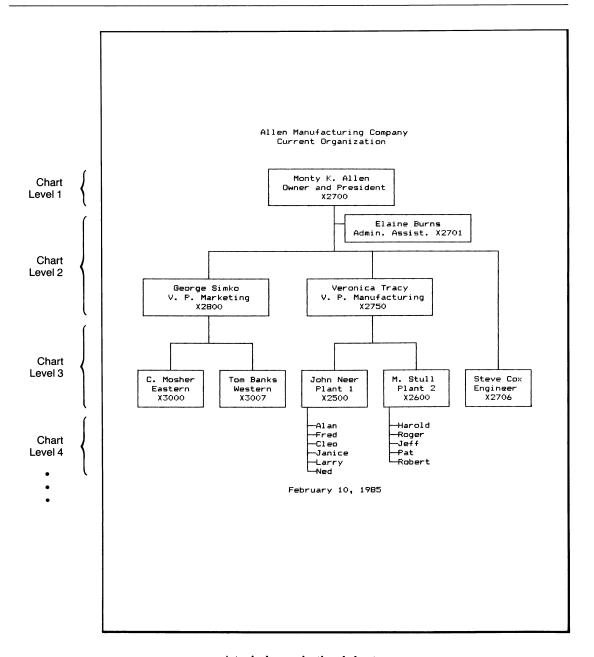
What Can Org Do

With Org you can automatically generate organization charts that can be printed on most printers. As you enter the names of managers and their subordinates, Org obtains all the information it needs to produce complex organization charts. Org draws boxes and connecting lines with perfect spacing. Org automatically centers the text in all of the boxes and obeys rules of organization chart protocol. You don't need to draw a thing, Org does it for you!

In addition, Org gives you a complete set of editing capabilities to insert, delete, and move employees or groups of employees within your chart. You can also print pieces of a chart or connect one chart to another. Org will even help you fit a big chart on a smaller piece of paper.

Org lets you have staff level employees and employees that are removed by more than one level from their manager. You can also supply a title, subtitle, and footnote for your chart. You can print your chart without boxes or connect an employee to his or her manager with a dotted line if you like.

Org does all of this without special graphics hardware. You can use almost any IBM PC configuration.



A typical organizational chart

What Equipment and Software are Needed

Org requires an IBM Personal Computer or 100% compatible computer with at least 192KB of memory and a double-sided diskette drive.

You also need the following:

- IBM or IBM compatible 80-Column Color or Monochrome Display
- IBM Disk Operating System (DOS) Version 2.0 or above
- A printer which operates from an IBM or IBM compatible Printer Adapter (sometimes referred to as a parallel printer port)

Note: If your computer has only 128KB of memory (except for PC*jr*), you can use a special version of Org with DOS 2.0 or 2.1. See "Getting Started" for instuctions on using this special version.

Getting Started

This chapter contains information and procedures you need to start using Org.

Copying the Org Diskette

You should make a working copy of the Org diskette before you use the Org program.

You need these additional items to make a working copy:

- A diskette containing DOS (if DOS is not installed on your fixed disk)
- One double-sided, blank diskette

Follow these steps to make a working copy of your Org diskette:

- Make sure DOS is loaded or installed on your default drive and the DOS default drive prompt is on your screen. In other words, if your default drive is A, drive A contains your DOS diskette and the prompt on your screen is A>.
- 2. Type diskcopy a: b: and press Enter .

3. Follow these steps:

- a. Remove the DOS diskette and insert the Org program diskette in drive A. It is your source diskette.
- b. If you have two diskette drives:

Insert a blank diskette in drive B. It is your target diskette.

If you have one diskette drive:

Proceed to step c. DOS will tell you when to insert the blank diskette. It is your target diskette.

The blank diskette does not need to be formatted. The DISKCOPY command formats the disk and erases any previously stored information.

- Press any key to begin copying.
 When copying is complete the following message will appear on your screen: Copy another (Y/N)?
- d. Type N
- 4. Remove the diskettes.
- 5. With a soft-tip pen, label the target diskette Org Working Copy.
- 6. Store the Org program diskette in a safe place and use the working copy for all other procedures in this book.

Starting a One- or Two-Diskette Drive System

If you have a system with one or two diskette drives (without a fixed disk), proceed as follows:

- 1. Make sure the DOS default drive prompt is on your screen. For example, if your default drive is A, the prompt on your screen is A>.
- 2. Insert the Org diskette in the default drive.
- 3. Type org and press Enter . You can type org in either lowercase (small) letters or uppercase (capital) letters. (If your system has only 128KB of memory, type org128 instead.)

After several seconds you see the Org Main Menu and copyright notice. This screen also tells you what version of the program you have.

If this is the first time that you are running Org, you should proceed to the section "Configuring Your System."

Installing Org on a Fixed Disk

Make sure that you have installed DOS on your fixed disk before you begin.

Then follow these steps to install Org on a fixed-disk system (such as a PC XT):

- 1. Make sure the DOS default drive prompt is on your screen. For example, if your default drive is C, the prompt on your screen is C>.
- 2. Insert the Org program diskette in the A drive and close the door. Then type a: fd and press Enter . (If your system has only 128KB of memory, type a: fd128 instead.)

- 3. A message will be displayed while Org installation is taking place.
- 4. When installation is finished, remove your Org diskette and store it in a safe place.

Starting a Fixed-Disk System

If you have a fixed disk (such as a PC XT), make sure that both DOS and Org are installed on your fixed disk, then follow these steps to start using Org:

- Make sure the DOS default drive prompt is on your screen.
 For example, if your default drive is C, the prompt on your screen is C>.

After several seconds you see the Org Main Menu and copyright notice. This screen also tells you what version of the program you have.

If this is the first time that you are running Org, you should proceed to the section "Configuring Your System."

Configuring Your System

Org needs some basic information about your printer and the disk drive you will be using. This information will be saved from work session to work session, so you do this procedure only once.

If you haven't already done so, start Org as described in the section "Starting a One- or Two-Diskette Drive System" or "Starting a Fixed-Disk System." Then follow these steps:

1. Select Configure System from the Main Menu. You can press the Cursor Down key until Configure System is highlighted and then press the Enter key, or you can type the letter C. A list of printers will be displayed.

2. Select your printer:

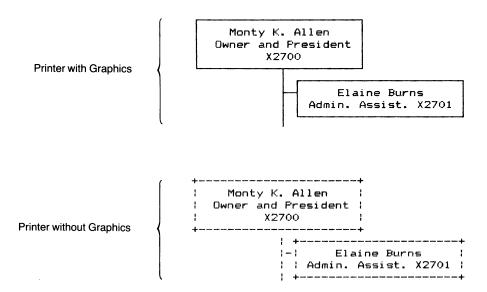
- a. If your printer is listed by name, use the Cursor keys,

 ↑ ↓ → , to select your printer and press

 Enter ← .
- b. If your printer is not listed by name, use the Cursor keys, [†] [+] [-], to choose one of the selections named Other. The Other printers are grouped in two categories: 80 column printers that print on letter size paper and wide printers that print on paper as large as 14 inches wide. Select the one that prints the same number of characters per inch (cpi) as your printer and press Enter [-].

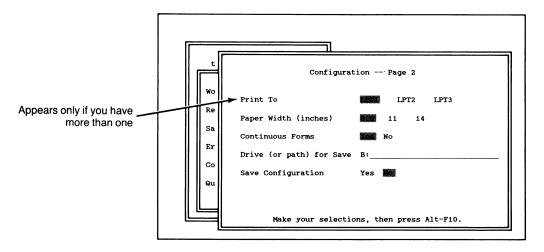
Configuration — Page 2 will be displayed.

Note: Some printers do not have the capability to print smooth solid lines. For the selections named Other, Org assumes that this is the case. Thus, your printed output will appear in one of two ways:



If you have a letter quality printer with a 10 or 12 cpi typing element, you may want to consider purchasing a 15 cpi element. A 15 cpi element will allow you to put a larger chart on the same size piece of paper.

3. If your system has more than one connection for a printer, the first choice will be labeled Print To. Use the Cursor Right key → to select the connection to the printer chosen above and press Enter ←.



Caution: Org does not support printers connected to an IBM Asynchronous Communications Adapter (sometimes known as a serial communications port). If you try to print to such a printer, you will receive an error message. You can print to a disk file.

- 4. The first choice for systems with only one printer connection will be Paper Width. Use the Cursor Right key to select the width of the paper in your printer and press Enter -.
- 5. The next choice is labeled Continuous Forms. If your printer uses continuous forms (each sheet of paper is connected to the next one) select **Yes** and press Enter |—|.

If your printer uses single sheets of paper select **No** and press Enter \blacksquare .

6. The next line is labeled Drive (or path) for Save. Type the drive you want to save organization charts to. For most two-diskette systems this would be B: For most fixed-disk systems type in C:

Note: Path is an advanced DOS command. Its use is optional and most people can ignore it.

Make sure all of your selections are correct. If not, you can use the Cursor keys 1 to return to a line and change the selection.

7. Then, for the last line labeled Save Configuration select Yes and press Enter (or press and hold Alt then press F10).

All the information you just entered will be saved on the program disk or diskette. Org will automatically get this information each time you start the program.

Note: If you want to make a temporary change in the configuration follow the above steps, but select **No** for Save Configuration. Org will forget the new settings when you exit the program.

Exiting Org

You can exit from Org by selecting Quit from the Main Menu.

To select Quit, press Cursor Down 1 to highlight Quit on your menu and press Enter 4, or type the letter Q.

Org will check to make sure that you have saved any chart which you may have modified. If you have not saved your chart, Org will warn you that the chart will be erased. Select **Yes** to erase the chart and exit to DOS. Select **No** to return to the Main Menu for another chance to save your chart.

Building An Organization Chart

After covering some basics about the use of Org, this chapter will take you step-by-step through the construction of an organization chart.

Commands

Commands tell Org what you want to do next. You will learn the most important commands in this chapter.

Most commands are initiated by pressing one of the function keys. These keys are labeled [F1] through [F10]. On the IBM PC, the function keys are located at the left side of the keyboard. Sometimes it is necessary to press and hold [Alt], then press the function key (for example, [Alt] - [F2]).

After you initiate a command, Org frequently displays a menu or question with several possible answers to choose from.

Making Choices

When Org presents you with a menu or "multiple-choice" question, you can respond in either of two ways:

- You can highlight the choice by using the Cursor keys,

 ↑ ↓ → ←, then press Enter ←.
- Or you can type the first letter of the choice.

From now on in this guide, when we ask you to make a choice or a selection you may use either method of making the choice.

Getting Help [f1]

You can press [f1] for help at any time.

A Help window will overlay part of the screen you are using. The Help topic will be the one judged appropriate given where you are. You can choose any other Help topic by making a selection at the bottom of the Help window.

Some help topics fill more than one window. A message will appear telling you there is More. You can scroll through these long topics using [PgUp] and [PgDn] or the Cursor keys [†] [].

Exit help by selecting **Exit** or by pressing **Esc**.

Backing Out [Esc]

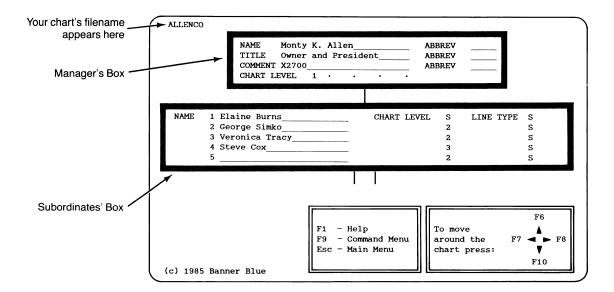
You can press Esc to back out of Org one step at a time. If you keep pressing Esc, you will reach the Main Menu. Then select **Quit** to return to DOS.

Some Essential Terms

In this section, we explain some terms to describe how Org is used.

Work Group

The term work group refers to an individual manager and the people reporting directly to him or her. A work group is the building block that Org uses to construct large organization charts. Org displays one work group on the screen at a time



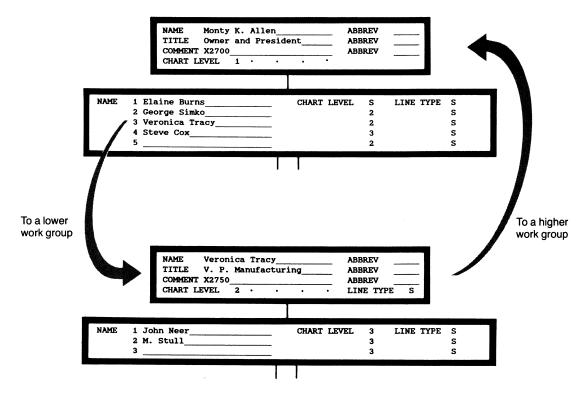
A Work Group

Manager's Box

In the work group display, the box at the top is referred to as the manager's box. It contains information about the manager of the work group. If the person has no subordinates, the work group will consist only of the person in the manager's box.

Subordinates' Box

The subordinates' box is the lower box in a work group. It contains a list of the people who report directly to the person in the manager's box.



Moving around the chart

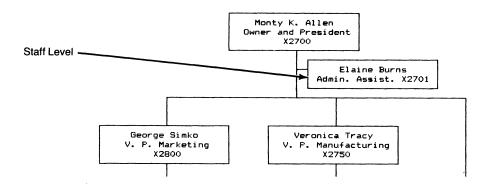
Moving Around the Chart

The term moving around the chart refers to the process of changing from the display of one work group to that of another. This gives you the capability of working with larger charts than can fit on your display at once.

Org lets you move around your chart just as if your organization chart were laid out in front of you. You can move up, down, and sideways to see work groups at higher, lower, or the same level of your organization.

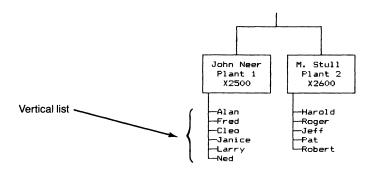
Staff Level Employee

The term staff level employee refers to a special location on the printed organization chart. Staff level employees are printed between a manager and his or her other subordinates. Many organizations like to place secretaries and administrative assistants in this special location.



Vertical Listing of Subordinates

At the bottom level of a chart, subordinates are sometimes listed above one another rather than side-by-side. This is referred to as a vertical list.



Starting a Chart

This section describes how to start a chart from scratch. If you have a one- or two-diskette drive system (rather than a fixed disk), make sure you have a formatted diskette available to save your chart.

Then, follow these steps:

- Select Work on Chart from the Main Menu. Org will display a box which represents the topmost position in your organization.
- 2. Type the name of the topmost manager and press Enter . (This is not the place to type the chart title, that comes later.)

Org now displays a work group. At the top is the person's name you just typed.

The work group, a manager with his or her subordinates underneath, is the primary building block for constructing an organization chart. The important thing about a work group is that all of the subordinates report directly to the manager at the top of the screen.

All information in the box at the top of a work group pertains to the manager. The choice of how much information to enter is entirely your own.

The fields (areas that you type into) labeled Name, Title, and Comment are self explanatory. However, they may be used for other information if you want.

Sometimes two people share a position. In this situation you can type one person's name *and* title in the Name field and the other person's in the Title field. In some cases you may want to make a chart without people, using only the names of departments or divisions. Or you may want to make a chart with a mix of departments and people. It's up to you. Throughout this

guide we will assume, however, that you are constructing a chart of managers and their subordinates — work groups.

The fields labeled Abbrev are for abbreviations of the information you enter in the respective Name, Title, and Comment fields. Org may use these abbreviations when printing your chart if there is difficulty making the chart fit the size you request. Entering abbreviations is optional.

The Chart Level field indicates a position's level in the organization. The top level is defined as 1. Don't worry if your organization numbers their levels differently. The levels don't print out on the final chart. However, you will need to follow Org's conventions while using the product.

Editing Fields

To edit the topmost manager's name or any other field, use the standard IBM PC editing keys:

- Cursor Left → or Cursor Right → to move character by character without erasing.
- Backspace ← to back up and erase the previous character.
- Insert Ins to enter insert mode for squeezing characters between those already there. (Your cursor changes to a small block to let you know that you are in insert mode.)

 Press Ins again to turn insert mode off.
- Delete Del to delete characters to the right, one-by-one.

Press Tab [1] to move out of the Name field to the Abbrev field to the right. The Tab key will always move you from field-to-field left-to-right. If you are already in the rightmost field, it will move you to the first field of the next row. Reverse Tab [1-] will move you from field-to-field in the opposite direction.

To move to a field directly above or below your current location in the box, use the Cursor Up

to or Cursor Down
keys.

Fill in as much information about the topmost manager as you want, then you will learn to enter his or her subordinates.

Adding Subordinates To the Work Group

Having entered information about the manager, now you add the subordinates that report directly to him or her. Proceed as follows:

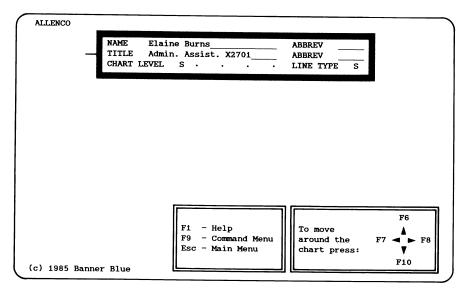
- 1. Press Cursor Down 1 to move to the lower box, the subordinates' box.
- 2. Type the name of the first subordinate that you want to appear on the printed chart and press Enter . The subordinates' box expands to make room for a second subordinate.
- 3. Enter as many direct subordinates as the topmost manager has (up to 16). They will appear left-to-right on the printed chart as they appear top-to-bottom in the box on the screen.

Notice that Org automatically fills in the Chart Level as one more than the person's manager, in other words, the next lower level. If the person works at an even lower level, you can specify a larger number.

Org also provides for staff level employees. They are identified with an S in the Chart Level field. A staff level employee cannot have subordinates. Consequently, a staff level employee is displayed differently on the screen.

The Line Type specifies whether an individual is connected to their manager with a solid line (S), a dotted line (D), or no line at all (N). Org automatically assumes that you want a solid line; you only need to change it if that is not the case. Since the topmost manager has no one above him or her, he or she has no field for a line type.

Chances are some of the subordinates of the topmost manager also have people reporting to them. The next section explains how to add these people to the chart.



Work group of staff level employee

Additional Work Groups

The work group is Org's building block. A subordinate in one work group is automatically the manager of a work group at the next lower level. When you display an individual's own work group you can add information about that person, for example a title. You can also add subordinates.

Follow these steps:

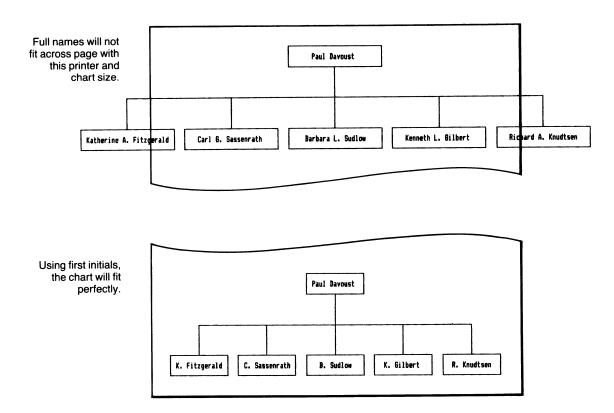
- 1. Select a person to which you want to add information or subordinates.
- 2. Press Cursor Up f or Cursor Down to move the cursor to that person's row in the subordinates' box.
- 3. Press F10 to perform the command Show Lower Work Group.

Org displays a new work group with the individual you chose at the top. Notice that the level for subordinates in the subordinates' box is automatically set to 3, one level lower than the manager's level. Remember, you can change this as you add subordinates' names.

4. Add information about the manager then add his or her subordinates.

Note: As you add work groups to your chart, keep in mind that your printer can print only so many characters across one page. If you type long names, titles, and comments, then fewer individuals can fit across the page.

It is also important to keep in mind that Org makes every box at a given level the same size. Therefore, just one long name, title, or comment can force Org to allocate extra space for everyone at a level.



How you can help make the chart fit

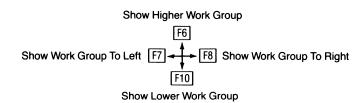
It is a good idea to limit the length of names, titles, and comments at levels with lots of individuals and/or fill in the Abbrev fields. (We're not suggesting that you rename people! You can use initials rather than full names and so forth.) How much you limit the length depends on your printer and the complexity of your chart.

Moving Between Work Groups

This section describes how you can move around the chart in any direction.

- 1. Press [F6] (from anywhere in your current work group) to perform the command Show Higher Work Group. Org will display the topmost manager's work group.
- 2. Select another person to which you want to add information or subordinates by moving the cursor to their row and pressing [F10].

If you have gotten the idea that your whole organization chart is arranged in the memory of your computer, you're right! Each work group is like a window through which you see a piece of your organization. You can move that window anywhere. Org has four keys, analogous to the cursor keys in a spreadsheet or a word processor, that allow you to move in any direction in your organization chart. So far you have used only the up and down keys, F6 and F10. Here is the whole set of keys for moving around the chart:



[F7] and [F8] allow you to move sideways within a level. Notice how these keys are laid out on the IBM PC keyboard, they have been chosen so that they are easy to remember. Take some time to move around your chart as it now stands. Notice that when you each the extreme top, bottom, left, or right, the keys for moving around do nothing.

Some of the positions in your chart will have no subordinates. Org represents them as a work group, too. This makes it easy to add subordinates should you ever need to. A single blank row at the bottom of the subordinates' box or a subordinates' box that is entirely empty are ignored by Org when the chart is printed. (Note that blank rows elsewhere in the subordinates' box will print as empty boxes.)

For the purposes of moving around the chart, staff level employees are considered to be at the same level of the chart as normal subordinates.

You may have noticed that F10, Show Lower Work Group, has some helpful characteristics. If your cursor is in a manager's box when you press F10, the work group of his or her leftmost subordinate (at the highest level of subordinates) will be displayed. If the person identified in the manager's box has no subordinates, the leftmost work group of the next lower level will be displayed.

There is also a way to move from wherever you are to another work group in a single jump.

The Command Menu

The Command Menu provides another way to perform commands.

1. Press [9] from anywhere in your chart. Immediately you will see the first page of the pop-up Command Menu. Selecting Modify or Print Chart will display the second page. You can return to the first page by pressing [Esc].

The first page of the Command Menu has all the commands for moving around and displaying the chart. The second page has the commands for modifying or printing the chart.

Every choice in the Command Menu can also be performed directly with the proper function key. In fact, you have already used four of the five "Show" commands that you see in the menu. You did this when you pressed [F6], [F7], [F8], and [F10] to move around the chart. When learning to use Org, it is a good idea to use the Command Menu for most of the other Org functions.

We said that we were going to learn how to make a single jump to any other work group in your chart, so let's do that.

- 2. Select **Index by Name** from the first page of the Command Menu. A list of names will appear, alphabetized by the first characters you typed into the Name fields.
- 3. Use the 1 and 1 and PgUp and PgDn keys to select the name of the person you want to display and press Enter .

You will move directly to that person's work group.

Note: If you have not typed a name into one or more of your positions, those blank fields will appear at the top of the alphabetized list.

Finish adding any other employees to your chart and then you will learn how to print it out.

Note: It's a good idea to make your first chart small. Keep it to 10 or 12 individuals until you get the hang of things.

Printing a Chart

If you did not configure your system as described in Chapter 2, do so now before proceeding.

To print a chart make sure your printer is connected and online. If you have been using your printer with another software product, it is a good idea to reset the printer (turn it off, then back on). Then follow these steps:

- Press F9 to display the Command Menu. Select Modify or Print Chart. This will display the second page of the Command Menu.
- 2. Select **Print Chart**. Print Chart will print your entire chart regardless of your current location within it.

You will be asked a number of questions to make sure that the chart appears as you want it to appear:

- 1. Org asks you, Print to the printer or to a disk file? Select **Printer**.
- 2. Next, Org asks, What size chart do you want? You can select any size, regardless of the size of your paper. If you specify a chart size larger than the paper in your printer, Org will print the chart out on multiple pages. The text on the pages will overlap so that you can trim the edge of one and tape it to the other.

If you have a large number of people in your chart or if you have a letter quality printer that prints only 10 or 12 characters per inch, you will probably want to select a size of 14×11 inches. Make your choice.

- 3. Finally, Org asks, Chart Format? Specify the printing of employee names, titles, comments, and boxes (around each employee) in whatever combination you want. A chart title, subtitle, or footnote is optional. Press Enter from the last selection or Alt F10 (signifying choices are complete) from anywhere in the form.
- 4. Org automatically formats your chart. If your unaltered chart is too large to fit on the page size you specified, Org asks if it should shrink your chart.

The objective of the shrinking process is to make your chart fit on the page while preserving as much information as possible. To shrink a chart, Org follows a process that can result in the use of abbreviations and printing some employees in a vertical list.

At the very lowest level of the chart, Org has the ability to present employees as a vertical list. Only the first line of text (name, title, or comment) will be printed. This vertical list takes up much less space than if each person had their own box.

When shrinking a chart, Org may also print the abbreviations you typed in the Abbrev fields of each work group. If you did not give an abbreviation, Org will generate one by taking the first five characters of the full name, title, or comment.

If Org asks whether to shrink your chart you can:

- Select Yes to proceed
- Select No to exit printing
- Press Esc to back up and make changes to your print request.

For your first chart select **Yes** and see what happens.

5. Sometimes a chart will not fit even after shrinking. In such cases Org asks your permission to trim the chart. To trim a chart, Org will print as many levels as possible and cut off the rest.

Keep in mind Org may trim a level because that level is too wide, not because the overall chart is too high. (These levels are not erased from memory. The only action Org takes is to suppress printing.) Some of the shrinking discussed above may also occur.

If Org asks whether to trim your chart you can select Yes, No, or press [Esc] as in the previous step.

Refer to Appendix B, Tips on Making a Large Chart, for ways to avoid both shrinking and trimming.

Note: Do you have some unexpected empty boxes or positions in your chart? That means you accidentally created some blank fields in one of the subordinates' boxes. Except for the bottom field, blank fields print out as blank boxes (you may want to do that on purpose). You can remove those empty positions using Delete Position, described in Chapter 4.

Saving a Chart

One of the advantages of Org over other methods of making an organization chart is the ease of modifying it when your organization changes. For this it is necessary to save the chart.

- 1. From your current location in the chart, press Esc. Org will return you to the Main Menu.
- 2. Select **Save Chart** from the Main Menu. Org will display the Save Chart window.
- 3. The Drive (or path) field should display the drive (or path) for saving charts that you specified in the section "Configuring Your System." If that drive is a diskette drive, make sure it contains a formatted diskette.

If you want the chart saved to a different drive (or path), press Tab [-1] to move to the Drive (or path) field. Type in the correct drive (or path). Press Enter [-1].

If the Drive (or path) field is empty, the chart will be stored on your default drive.

Note: Path is an advanced DOS command. Its use is optional and most people can ignore it.

4. Type the name you want into the Filename field (in DOS format) and press Enter — . Org will confirm that your chart has been saved.

If you have previously saved the same chart on the diskette or fixed disk, its name will automatically appear in the Filename field. To replace the chart on the disk with your current one, press Enter —. Org will ask you to confirm your action when you try to replace another chart on the disk.

Erasing a Chart

You may want to erase the current chart in order to start another.

- 1. If the Main Menu is already displayed proceed to step 2. Otherwise, press [Esc] to return to the Main Menu.
- 2. Select Erase Chart from the Main Menu.
- 3. Org will check to make sure that you have saved any chart that you may have modified. If you have not saved your chart, Org will warn you that the chart will be erased.

Select **Yes** to erase the chart and return to the Main Menu. Org will confirm that it has erased the chart.

Select **No** to return to the Main Menu for another chance to save your chart.

Retrieving a Chart

To retrieve a chart from a diskette or fixed disk:

- 1. If the Main Menu is already displayed proceed to step 2. Otherwise, press Esc to return to the Main Menu.
- 2. Select **Retrieve Chart** from the Main Menu.
- 3. Org will check to make sure that you have saved any chart you may currently be working on. If you have not saved your chart, Org will warn you that the chart will be erased. Select Yes to erase the chart and display the Retrieve Chart window. Select No to return to the Main Menu for another chance to save your chart.

4. If you want the chart retrieved from a different drive (or path) than displayed in the Drive (or path) field, press

Tab → to move to the Drive (or path) field. Type in the correct drive (or path). Press Enter → .

If the Drive (or path) field is empty, the chart will be retrieved from your default drive.

- 5. You can select the name of the chart to retrieve in either of two ways.
 - You can highlight the name using the Cursor keys ↑ ↓ → . When you have highlighted the name of the chart you want to retrieve, press Enter ← .
 - Or, you can type the name of your chart into the Filename field and press Enter ☐ . Once you start to type a filename, you cannot use the Cursor keys to highlight a name listed below the Filename field.

Org will retrieve your chart and display the topmost person.

4

Other Functions

This chapter describes additional functions which will allow you to maximize the value of Org.

All commands or functions may be invoked directly with the appropriate function key or by selecting them from the Command Menu (obtained by pressing [F9]).

Append Chart Alt - F9

Org lets you attach a chart from your disk to the chart you are currently working on. This is called appending a chart.

To append another chart stored on your disk proceed as follows:

- 1. Place the cursor where you want the topmost manager of the chart you are appending to appear as a subordinate.
- 2. Select **Append Chart**. Org will bring up a window which asks you to identify the name of the chart you want to append.
- 3. Select a chart (as described in the section "Retrieving a Chart") and Org will append it.

Delete Position [F4]

Delete Position is used to delete a single position or an entire branch of a chart.

When a position is deleted, the box entirely disappears from the printed organization chart. If one employee has simply been replaced by a new one, you should type over the former employee's name. There is no need to delete the position.

To eliminate a single position, follow these steps:

- 1. Place the cursor on the position to be eliminated.
- 2. Select **Delete** Position. Org will ask you to confirm that you want to delete the position. Select **Yes** if that is still your intention.
- 3. If the position being deleted has subordinates reporting to it, Org asks if you want to delete just the individual's position or the group. Select **Individual**. All the subordinates will then be made to report to the next higher manager. (If this would give the next higher manager more than the maximum allowable 16 subordinates, Org will disallow the operation.)

To eliminate a branch of the chart (a position's immediate work group and all of the lower work groups reporting through the position), follow these steps:

- 1. Place the cursor on the topmost position to be eliminated.
- 2. Select **Delete Position**. Org will ask you to confirm that you want to delete the position. Select **Yes** if that is still your intention.
- 3. When Org asks whether you want to delete an individual or a group, select **Group**. (Org asks this question only if the position has subordinates.)

Note: There must be one and only one topmost position in each chart. For that reason the topmost position can be deleted only if it has exactly one subordinate reporting directly. If a topmost position having several subordinates were deleted as an individual, that would result in those subordinates being the heads of several unconnected work groups. Org is not designed to handle that.

If you want to delete the entire chart, select **Erase Chart** from the Main Menu.

Insert Position [F3]

Insert Position allows you to insert a new level into the chart or insert a new subordinate position anywhere in the subordinates' box. The action depends on where you are when you select Insert Position.

To insert a new level of management into the chart:

- 1. Place the cursor anywhere in the manager's box of the individual that reports to the new position.
- 2. Select **Insert Position**. An empty manager's box will be displayed. Everyone reporting through the new manager will be moved down in the chart one level.

You can also insert a new position in the subordinates' box:

- 1. Place the cursor anywhere in the row in which you want the new subordinate
- 2. Select **Insert Position**. The position containing the cursor and all those below it will move down so that you can type in the new subordinate.

Move Position Alt - F3

Move Position allows you to "pick-up" a position or an entire branch of the chart and move it somewhere else.

The simplest type of move involves rearranging the individuals in the subordinates' box under a single manager. Follow these steps:

- 1. Place the cursor on the position you want to move.
- 2. Select **Move Position**. Org displays an asterisk by the name of the person to be moved.
- 3. Now, move the cursor to the row in which you want the position placed.
- 4. Select **Move Position** once more.

Org will confirm that you indeed want to move the person selected earlier. Assuming you have not changed your mind, select **Yes**. The previous occupant of that row and the individuals below will be moved down, and the person you identified earlier will be moved in. If any of the individuals being shuffled have subordinates, they will be moved right along with their manager.

If you select **No** or press [Esc], Org will cancel your request to move the position.

You can also move a position so that it reports to another manager.

- 1. Place the cursor on the position you want to move.
- 2. Select **Move Position**. Org displays an asterisk by the name of the person to be moved.

- 3. Display the location in the chart where the position should now appear. (You can do other things along the way; Org will remember the position you want to move.) If you want to insert the position as a new level in the chart, place the cursor in the manager's box of the work group that should report to the person being moved. Otherwise, place the cursor at the appropriate place in the subordinates' box under a work group's manager.
- 4. Select **Move Position** once again. Org will confirm that you want to move the position you selected. Assuming you have not changed your mind, select **Yes**.

Depending on a number of conditions, Org may need to ask more questions.

If the position being moved has subordinates, and you have placed the cursor in the subordinate area of another work group, Org will ask if you want to move just the individual or the group. Select **Group** if you want the position's immediate work group and all lower work groups reporting through the position to be moved. This action picks up a branch of the chart and attaches it at the desired location. Select **Individual** if you want the subordinates left behind. Org will name the manager of the work group left behind "Open."

If the position being moved has subordinates, and you want to insert it as a new level elsewhere in the chart, Org will inform you that the subordinates must be left behind. A work group can be attached to another position, but it cannot be inserted. Org will create a new position for the individual being moved and name the one left behind "Open." If you want to move the subordinates as well, additional steps are required. First, move the management position as described, then move the Open position so that it reports to the first person moved. Finally, delete the Open position.

Print Part Alt - F2

Printing part of a chart is the same as printing the whole chart except that you specify the area of the chart to be printed.

- 1. Place the cursor on the position you want to be at the top of the printed chart.
- 2. Select **Print Part**. Org will confirm the name of the person to be at the top of the chart and ask you how many levels you want to print. If you want to print all the way to the bottom of the chart, select **All** levels.

From this point on, printing part of a chart is the same as printing all of the chart (see Chapter 3).

Print to Disk

You can print an entire chart F2 or just part of a chart Alt - F2 to a disk file.

When either of the two print commands asks: Print to the printer or to a disk file? You should select **File**.

The file will be written in a format compatible with the printer you specified when you configured the system. This file cannot be loaded back into Org.

To print the disk file using DOS, use the DOS COPY command (some graphics characters being sent to your printer might cause the DOS PRINT command to behave incorrectly):

copy/b file-specification device-name

If you want to write an ASCII file to disk, re-configure your system as described in Chapter 2 selecting one of the printers named Other.

Save Part Alt - F8

Save Part will save to a disk file any part of the organization chart you are currently working on. The piece that is saved can be worked on as a chart in its own right or it can be appended to another chart.

To save part of a chart:

- 1. Place the cursor on the position you want at the top of your saved chart. Every work group below and reporting through this position will be saved.
- 2. Select **Save Part**. Org will display a window in which you must choose a name for your chart then press Enter —.
- 3. Org will save the part of your chart you specified.

Note: If you Save Part from the position of the topmost manager, it is equivalent to selecting Save Chart from the Main Menu.

Show Entire Chart [F5]

Show Entire Chart lets you see a map of your chart. It is very useful for seeing where your current work group is with regard to the rest of the organization.

Each regular position will appear as a small square. Each staff position will appear as a dash. The current position will blink on and off. If you have a very large chart, some of the individual positions may overlap.

You can leave the map by pressing any key.

Show Top Work Group

Alt - F6

Show Top Work Group displays the work group of the topmost manager directly from your location anywhere in the organization chart.

If you are already at the top level of the chart, nothing will happen when you try to Show Top Work Group.

Appendix A Key Assignments

Editing Text in a Field

- Cursor Left → and Cursor Right → to move character-bycharacter without erasing.
- Ctrl Cursor Left and Ctrl Cursor Right to move word-by-word without erasing.
- Backspace to back up and erase the previous character.
- Home and End to move to the beginning or the end of the field.
- Ins to enter insert mode for squeezing characters between those already there. (Your cursor changes to a small block to let you know that you are in insert mode.) Press Ins again to turn insert mode off.
- Dell to delete characters to the right, one-by-one.
- Caps Lock and Num Lock work in the normal fashion.

Selecting Menu Items

- Spacebar moves one position.
- Cursor keys ↑ ↓ → ← move one position.
- Home and End move to the first or last selection that you can currently see on the screen.
- If the selections overflow the window (this can happen in Saving and Retrieving charts or when using the Index by Name), Ctrl Home and Ctrl End move to the first or last selection in the list.
- PgUp and PgDn move one page at a time in the Index by Name.

Moving Between Fields

For moving between fields in a work group or a form (such as the Chart Format when printing or Configuration — Page 2):

- Tab → moves one field to the right until at the rightmost field, then it moves down and to the leftmost field.
- Reverse Tab moves one field to the left until at the leftmost field, then it moves up and to the rightmost field.
- Cursor Up
 and Cursor Down
 move to the field immediately above or below the current field.
- Ctrl Cursor Up 1 and Ctrl Cursor Down 1 move to the upper left or lower left field.
- Enter → moves down and to the left. Exceptions: Enter → adds additional fields when at the bottom row of a work group and when pressed while in the bottom row of a form it signifies that you have completed work on the form.

Note: All of the keys for moving among data entry fields, except Enter , wrap from the top to the bottom of the screen and vice versa.

Selecting Commands

- F1 Help
- F2 Print Chart
- F3 Insert Position
- F4 Delete Position
- F5 Show Entire Chart
- F6 Show Higher Work Group
- F7 Show Work Group To Left
- F8 Show Work Group To Right
- F9 Command Menu
- F10 Show Lower Work Group
- Alt-F2 Print Part
- Alt-F3 Move Position
- Alt-F5 Index by Name
- Alt-F6 Show Top Work Group
- Alt-F8 Save Part
- Alt-F9 Append Chart
- Alt-F10 Choices Complete

Appendix B Tips on Making A Large Chart

Most charts that Org generates will look great, but sometimes you may want to take control of how things look. After all, Org can't perform magic. A knowledge of how Org works can allow you to tune your charts to get just what you want.

The number of characters that can be printed across a page is determined by your printer. This means only a given number of employees can fit across the page.

For example, let's assume your printer allows a maximum of 80 characters in a line across the page. Let's also assume that at the widest part of your chart there are 5 employees across. If we divide 5 into 80 we find that each employee can be no wider than 16 characters across (that includes room for the box and space between the boxes). Since Org uses up 6 characters for the box and spaces between them, the names, titles, and comments can be 10 characters long at most. If the names were 11 characters long, 5 employees would no longer fit across the page.

Org allocates space for each employee at a given level based on the longest name, title, or comment at that level. One extremely long name or title can force Org to allocate extra space for everyone at that level and in the levels above. Org does this so that at each level every employee can have a box of the same size. A position also has a box at least as large as those in the level below. It's protocol! If Org finds that the employees will not fit across the page you have specified, it is forced to shrink the chart or abandon printing. Org will first try to make the chart narrower by placing individuals at the lowest level of the chart in a vertical list. If that is unsuccessful, it will try abbreviating names, titles, and comments level-by-level.

To control the amount of shrinking that occurs, you must make sure that you have not made the names, titles, and comments too long. The table, "Guidelines on Text Length," gives you a starting point to judge how long each name can be given your printer and the number of employees in a level. However, it is only an estimate. It holds only if the employees are contiguous. If a manager at the next higher level has no subordinates, he or she will cause gaps to occur between subordinates below. The names, titles, and comments would have to be even shorter in that case.

There are four dots at the bottom of each manager's box to help judge text length. They line up with the 10th, 15th, 20th, and 25th characters of the name, title, and comment fields.

At the top levels of your chart, where there are fewer positions across, you can generally have longer names, titles, and comments.

Name Length

If you are preparing a large chart, type in just the names of the various employees, keeping in mind the guidelines for text length. Print out the chart and see how it looks. If it looks good, go back and enter the rest of the text making sure that you keep it shorter than the longest name at each level.

On the other hand, if there has been undesirable shrinking, find the employee with the longest name at the level that seems to be causing the problem. As a test, type into the Comment field of that employee a shorter version of his or her name (for example, use a first initial rather than the full first name). To avoid shrinking, follow these guidelines for the maximum allowable length of a name, title, or comment at a given level of your chart. Guidelines assume that you are printing boxes around each position (text can be two characters longer if you are not printing boxes).

For Printers With 10 Characters Per Inch

For Printers With 16-18 Characters Per Inch

Chart Width	8.5"	11"	14"		Chart Width	8.5"	11"	14"
# of Employees Across Level	Max Length of Name, Title, or Comment			-	# of Employees Across Level	Max Length of Name, Title, or Comment		
2 3 4 5 6 7 8	25 20 14 10 7 5 4	25 25 20 15 11 9 7	25 25 25 21 16 13 10		2 3 4 5 6 7 8	25 25 25 19 15 12 10	25 25 25 25 25 22 18 15	25 25 25 25 25 25 25 21
9 10	2 2	5 4	9 7		9 10	8	12 10	18 15
11 12 13 14 15 16 17 18 19	1	3 2 2 1 1	6 5 4 3 3 2 1 1	_	11 12 13 14 15 16 17 18 19 20	5 4 3 3 2 2 1	9 8 6 6 5 4 3 3 2 2	13 12 10 9 8 7 6 6 5 4
					21 22 23 24 25 26 27 28 29		2 1 1	4 3 3 3 2 2 2 1 1

Note: There will be variations among printers. Use these estimates as a starting point.

Guidelines on Text Length

Now print the chart again, but ask to print Comment fields only. Answer **No** to Names and Titles. The printed boxes will be empty except for the ones with "test" names. If the name is not abbreviated by Org, you know that by keeping all text to the length of your test name (for that level and below) you will have the chart you want. Enter the balance of your information and print normally. If the name is still being abbreviated, try again with an even shorter test name.

The beauty of Org is that you can do a test like this in matter of minutes because Org is doing all the work, not you!

Of course, most charts that Org shrinks look just fine. They can look even better if you plan ahead.

Vertical Lists

Many people prefer a chart that has employees at the lowest level listed vertically instead of in boxes. This is also one of Org's most effective ways of shrinking a chart; however, you must be careful not to eliminate this tool from Org's bag of tricks.

If you can avoid it, don't put just one or two people at the lowest level of a large chart.

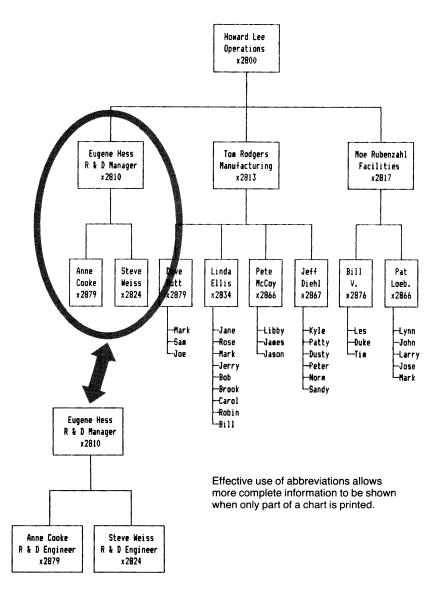
Org can only generate vertical lists of people who are at the lowest level. For the vertical list to effectively shrink a chart, the lowest level should have the largest number of individuals. Fortunately, most organizations are structured that way.

Abbreviations

Make good use of abbreviations. Org will generate them for you by taking the first five characters, but that is not the most attractive solution. Supply your own at levels of the chart where they are needed.

One trick is to place the most important information in the Abbrev fields, rather than short versions of what is in the full length fields. For example, if the name is the most important information to appear on your chart, you might want to put the first name in the top Abbrev field and the last name in the second and/or third Abbrev fields.

Richardson Manufacturing Light Alumninum Castings



Effective use of abbreviations

Sometimes it is possible to set up Org so that carefully selected abbreviations are printed when the entire chart is printed, but the whole name, title, or comment is printed when only a part of the chart (such as a department) is printed.

Other Tips

- Try selecting a larger size for your chart.
- Charts printed without boxes take up less space than ones that have them. If you are currently asking for boxes, you can specify a chart without them.
- If a chart is too high (top to bottom), you can reduce the number of lines of text. For example, print names and titles instead of names, titles, and comments.
- Space is reserved on the page for the chart title and subtitle only if you have them. Thus, a chart without a title can be slightly higher than one with a title.

When It's Too Big

Some charts are just too big to print out all at once. Print out the chart in smaller pieces such as departments or branches. Org may not need to shrink any of the pieces.

With Org you can try several different presentations in a matter of minutes and select the one you prefer.

Appendix C Memory Utilization And Other Org Limits

- There is an upper limit of approximately 250 positions in the chart. A removed report, a position that is more than a single level down from its manager, uses the equivalent of one position for every intervening level. (If your system has only 128KB of memory, there is an upper limit of approximately 50 positions.)
- There is a maximum of 16 subordinates per manager.
- A chart can have only one position at the topmost level.
- A chart can have a maximum of 99 levels.

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