

OrgPublisher Advanced Box Layout Editor

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OrgPublisher 10 Training

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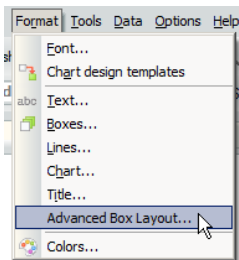
1 Advanced Box Layout Editor

The Advanced Box Layout Editor provides additional control on how the data displays within the chart box. It allows the placement of horizontal and vertical lines, background area coloring to highlight data, and additional labeling for the organization.

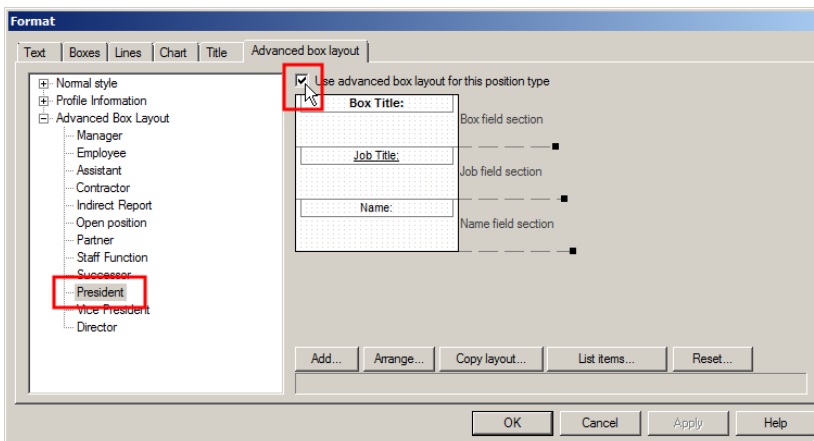


4 Minutes

1. Click **Format**, then **Advanced Box Layout**.

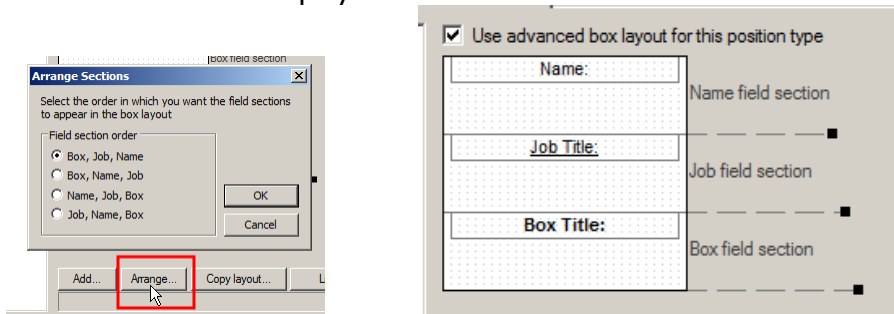


2. Select a Position Type.



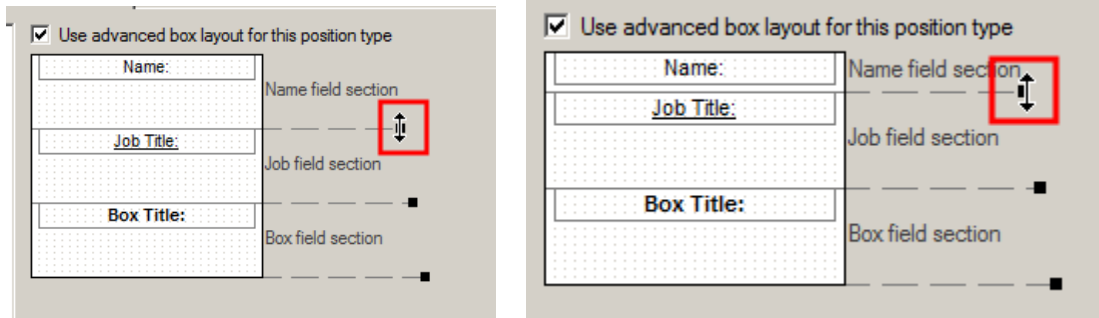
1.1 Arrange the Chart Box Sections

Click **Arrange** to change the order of the three sections: box, name and job title. In the first screenshot (shown above), the default order is Box, Job, Name. The Name, Job, Box option was selected and is displayed in the second screenshot below.



1.2 Size the Chart Box Section

Place the mouse pointer on the section sizing handle. An up/down arrow will display, allowing you to drag the section handle up or down to adjust the section's height. Box width cannot be set in **Advanced Box Layout**. To adjust the box width, use **Format, Boxes**, and set the width.



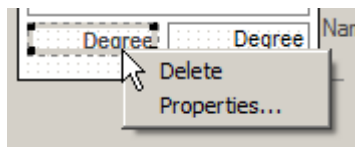
1.3 Move, Delete or Resize a Data Element

Fields have two elements - a label and data field. These elements can be moved or deleted from the chart box section.

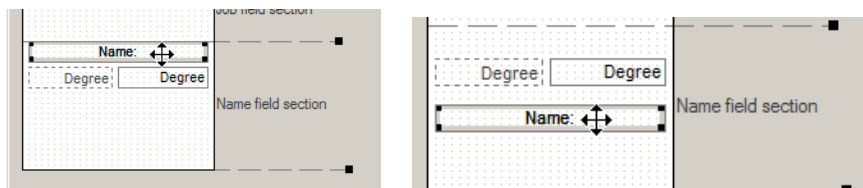
- The label is a dashed outline and the data field is a solid outline



- Delete an element - Right click the element and select **Delete** from the context menu to remove.



- Move an element - Place the mouse pointer over the element and click. This selects the element. Move the pointer on top of the element and it changes to a 4-headed arrow. Hold the left mouse button down and drag to a new location.



Please note: You cannot move elements from one section of the chart box to another.

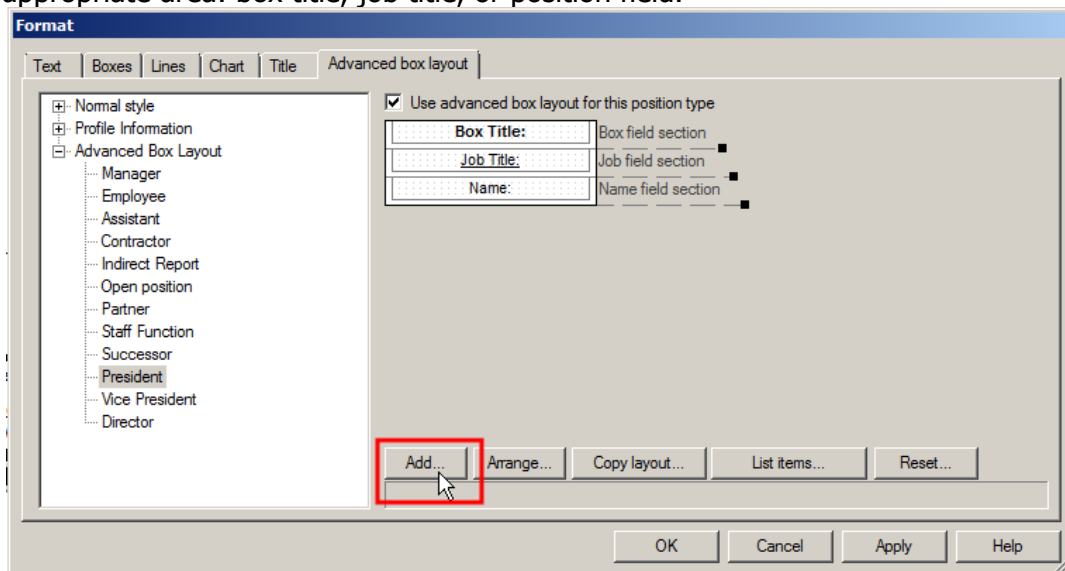
- Change the size of an element – Place the mouse pointer on the edge of the element; the pointer changes to a double-headed arrow. Hold the left mouse button down and drag to resize.



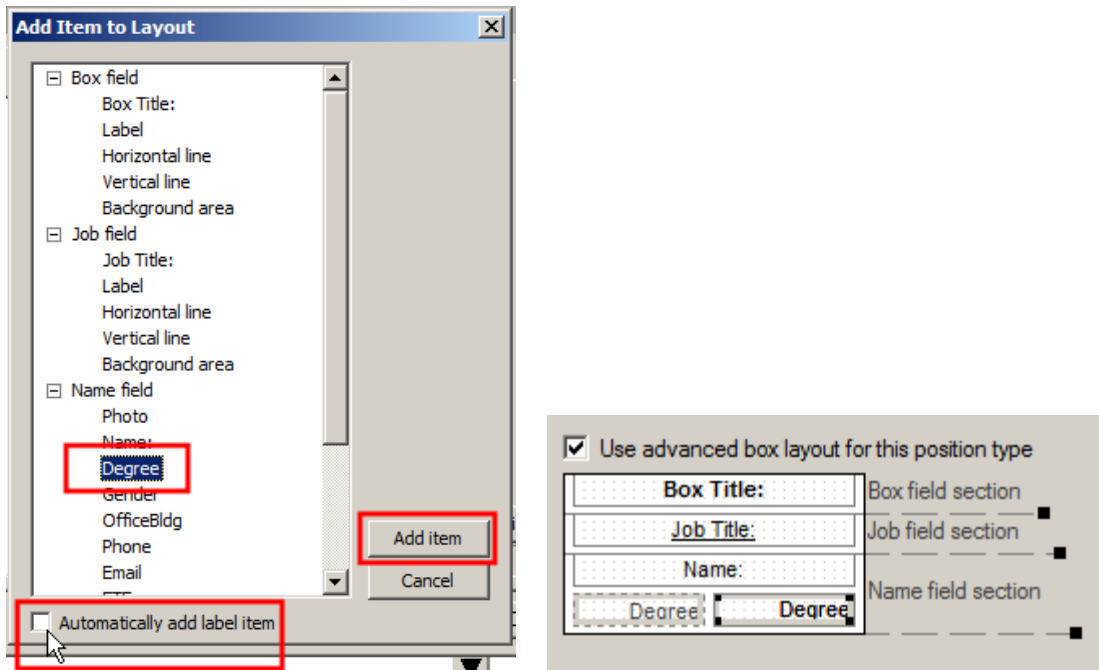
Please note: The size of the element determines how much data from that field will display. The element does not get taller to allow for text wrapping. You must increase the element height to allow text wrapping.

1.4 Add a Field to the Chart Box

1. Click the **Add** button and then select the field to be added. It will be added to the appropriate area: box title, job title, or position field.

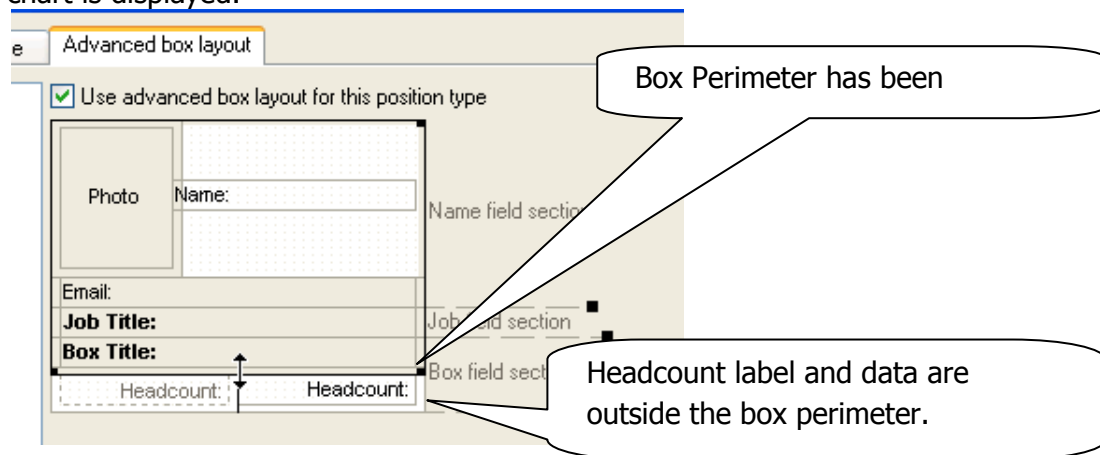


2. Select **Automatically add label item** if desired to include the label element as well as the data element.



1.5 Place text outside of the box

- a. Click the perimeter of the box to select it.
 - b. Place the mouse pointer on the selected perimeter; the pointer changes to a double-headed arrow. Hold down the left mouse button and drag to a new size.
- Any field outside of the new box perimeter appears outside of the box when the chart is displayed.

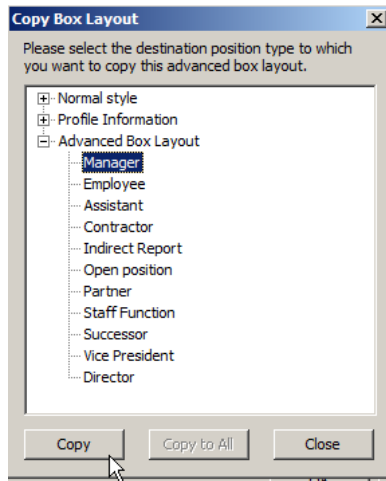


1.6 Copy Formatting to another Position Type or another Style

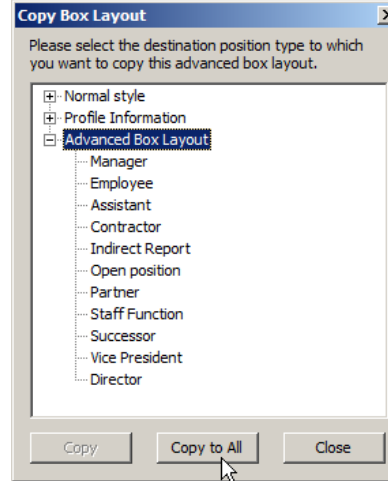
You can copy a layout to another Position Type in that Style or another Style.

1. Click the **Copy layout** button.
2. Select the Position type or Style and Position Type where you wish to copy.

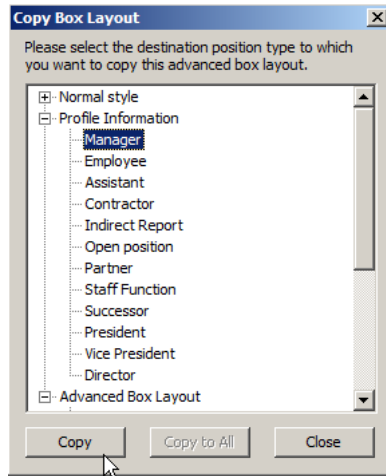
Position Type in the Same Style



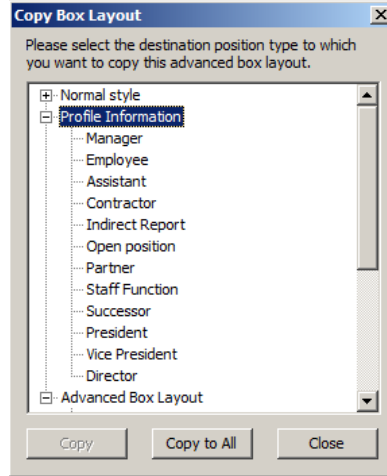
All Position Types in the Same Style



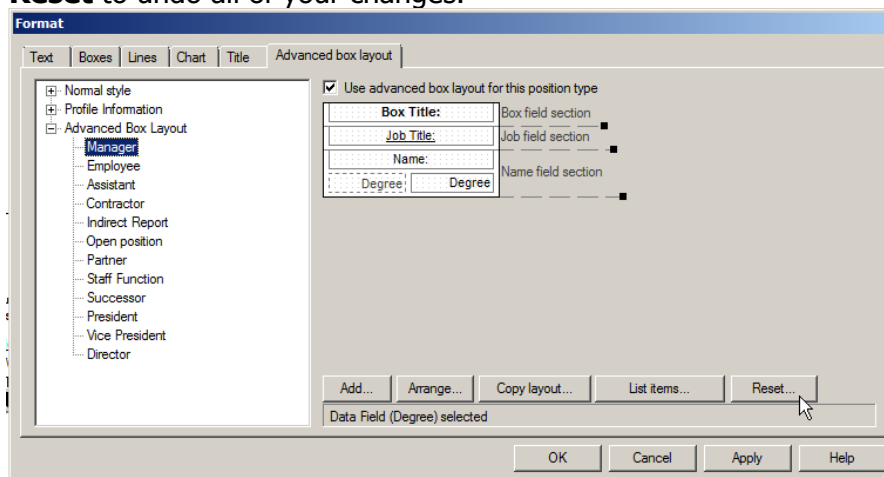
Position Type in a Different Style



All Position Types in a Different Style



3. If you change your mind, click to select the Position Type or Style Name and choose **Reset** to undo all of your changes.



1.7 Adding Lines and Adjusting Field Positions

Once data fields and lines have been added to the chart box, you may need to adjust positioning of these elements.

1. Select the element to move or adjust.
2. Click on the element you wish to move. The element has a black square in each corner. If you selected a line, each end of the line will have a black square.
3. To move the element, place the mouse pointer on the element. A 4 headed arrow indicates that you are in the correct position to move the element. Hold the left mouse button down and drag the element to the new location.
4. To change the size of the element, place the mouse pointer on the edge of the element until you see a double headed arrow. The double headed arrow points in the directions you can drag and drop to increase/decrease the size of the element.
5. If you have placed an element on top of another, you will need to move the element out of the way to work with the underlying element.
6. To make more room in the area of the box, grab the section sizing handle to create an open area. Then, use the white space to park elements until you are ready to re-position them within the chart box.

Departmental Totals			
	Budget	Total	Expense
Salary	Salary	Total Salary	percentage
Travel	Total	Total Travel	percentage

Departmental Totals			
	Budget	Total	Expense
Salary	Salary	Total Salary	percentage
Travel	Total	Total Travel	percentage

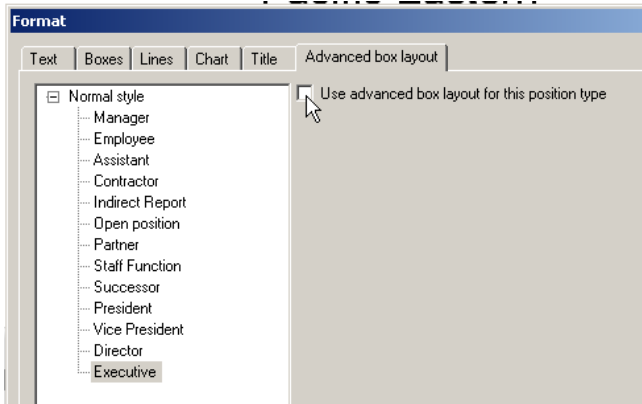
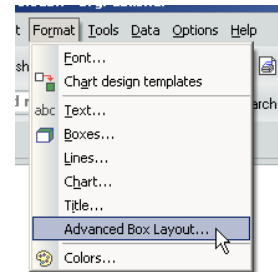
Departmental Totals			
	Budget	Total	Expense
Salary	Salary	Total Salary	percentage
Travel	Total	Total Travel	percentage
			Expense

Departmental Totals					Name field section
	Budget	Total	Expense	Budget	
Salary	Salary	Total Salary	percentage	percentage	
Travel	Total	Total Travel	percentage	percentage	

1.8 Remove Advanced Box Layout Settings

If you decide you do not want to use Advanced Box Layout Settings within the chart, you can remove the formatting by:

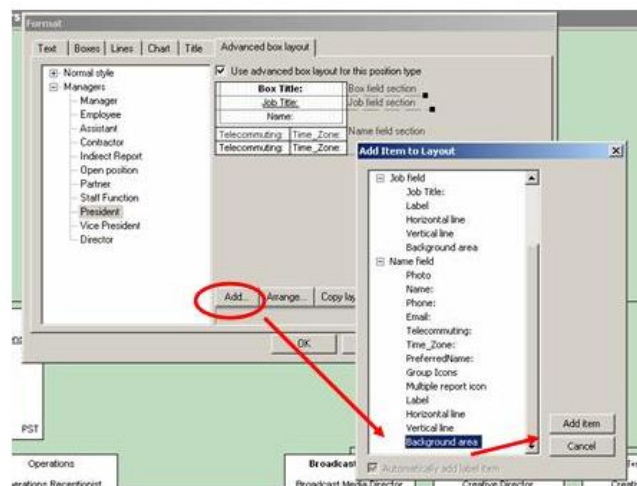
1. Click on Format, then Advanced Box Layout.
2. Select the Position Type.
3. Click to remove the check mark beside *Use advanced box layout for this position type*.



4. Repeat this step for each Position Type, then click on OK.

1.9 Background Colors for Areas of the Box

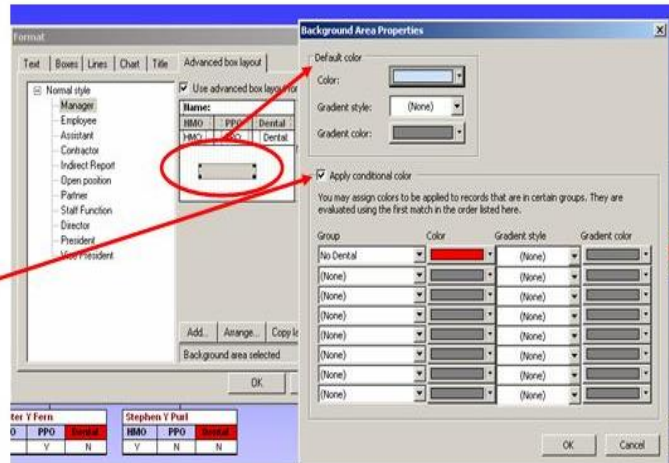
1. Click **Format**, then **Advanced Box layout**.
2. Select a Position Type.
3. Check the **Use Advanced box layout...** option.
4. Make changes, such as adding fields to display, arranging display order, adding horizontal or vertical lines etc.
5. Click the **Add** button.
The *Add Item to Layout* dialog opens.
6. Select **Background area**.



7. Drag the corners to size the background area.
8. Double click the Background area box.

The *Background Area Properties* dialog opens.

9. Select the default color.
 - a. Select **Apply conditional color** to format the color based on Group membership. See the *Search and Group* manual for more information.
 - b. Click **OK**.



10. Click **OK** and view a chart box for the modified Position Type.
11. Return to the Advanced Box Layout Editor to copy the new format to additional Position Types.

Results:

- A has health insurance and dental.
- B has health insurance, no dental.
- C has no health insurance, but no dental.

Gregory K Pink			
HMO	PPO	Dental	
N	Y	Y	

A

Leslie T Reder			
HMO	PPO	Dental	
N	Y	N	

B

Carol M Jones			
HMO	PPO	Dental	
N	Y	N	

C

Spender T Wright			
HMO	PPO	Dental	
N	N	N	

Other visible records:

Kayla K Melton			
HMO	PPO	Dental	
N	Y	Y	

Ki G Wang			
HMO	PPO	Dental	
N	Y	Y	

2 Advanced Box Layout Editor Examples

Workforce Intelligence


Workforce Intelligence
President



Russell O Heis

FTE 145.97	Head Count 154
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Creative
Creative Vice President
Paul M Melbram



Prior Positions:
Producer
Production Coordinator
High Performer: 2
High Potential: Y

FTE 44.85	Head Count 48
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Information Technology
Director of Technology
Gregory K Pink



Prior Positions:
Applications Manager
Bus. Applications Mgr.
High Performer: 2
High Potential: N

FTE 18.30	Head Count 20
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Creative
Creative Vice President
Paul M Melbram



Salary	\$99,000
Travel Expense YTD	\$20,000

Departmental Totals				
	Budget	Total	Expense	Budget
Salary	\$2,280,000	\$2,355,000	32%	25%
Travel	\$202,300	\$111,950	37%	42%

Workforce Intelligence

Russell Heis
President

Successor Name	Potential	Ready
Paul Melbram	Y	Y
Susan Hester	N	Y

Executive Staff

Assistant to President
Bobbie Johnson

Paul Melbram
Creative Vice President

Successor Name	Potential	Ready
Kyle Yellow	N	Y
Laney Pearson	N	Y
Jessie Fister	N	Y

Paul M Melbram

Birthdate	Hired	Est. Retirement
08/24/1967	06/29/1999	08/24/2032

Age	Tenure	Yrs to Retirement
42	10	23

401K	ESPP	Pension
Y	Y	N

Creative Vice President