

OrgPublisher Advanced Box Layout Editor

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Advanced Box Layout Editor

OrgPublisher's Advance box Layout Editor provides additional control on how the data displays within the chart box. You can set the placement of horizontal and vertical lines, background area to highlight data, and additional labeling for the organization.

Using the Advanced Box Layout Editor

1. Click **Format** in the main menu then **Advanced Box Layout**.
2. Select a position type to format.

Arranging Chart Box Sections

The default order of the primary three fields in OrgPublisher chart boxes is **Box** first, **Job** second, and **Name** third.

1. You can modify the sequence of the name, job, and box title fields by clicking **Arrange** at the bottom of the dialog. The *Arrange Sections* dialog opens.



Figure 1.

2. Select the field sequence you want to use and click **OK**.

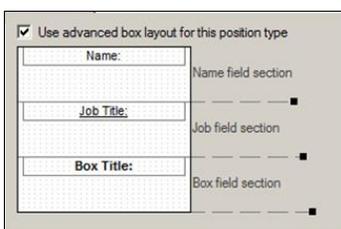


Figure 2.

Sizing the Chart Box Section

Place the mouse pointer on the section sizing handle. An up/down arrow appears. Drag the handle up or down to adjust the section height.

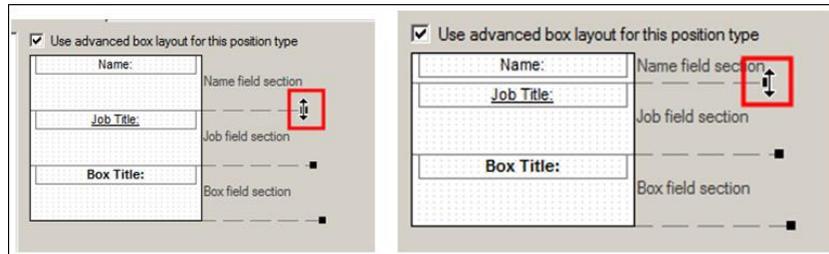


Figure 3.

To adjust the box width, access the **Boxes** tab in the *Format* dialog.

Moving, Deleting, or Resizing a Data Element

Each field contains two data elements, the field label and the field data. These elements can be moved or deleted from the chart box section.

The label is outlined with a dashed line and the data is outlined with a solid line.



Figure 4.

- To delete an element, right-click on it and select **Delete** from the context menu.

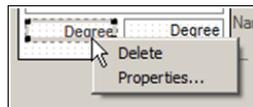


Figure 5.

- To move an element, place the mouse cursor over the element and click to select. Move the pointer on top of the element and it changes to a 4-headed arrow.

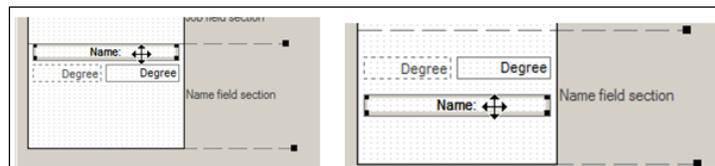


Figure 6.

Hold the left mouse button down and drag the element to a new location.

Note: Field elements cannot move from one section of the chart box to another.

- To change the size of an element, place the mouse pointer on the edge of the element. The pointer changes to a double-headed arrow.

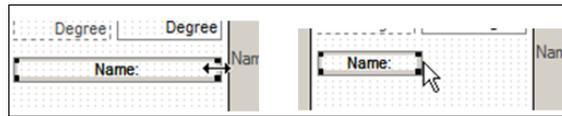


Figure 7.

Hold the left mouse button down and drag to resize.

Note: The size of the element determines how much data displays in that field. The element does not get taller to allow for text wrapping. You must use the resize tool to increase the height of the element.

Adding a Field to the Chart Box

- Click the **Add** button at the bottom of the **Advanced box layout** tab. The *Add Item to Layout* dialog opens.



Figure 8.

- Select **Automatically add label item** if you want to label with the data.

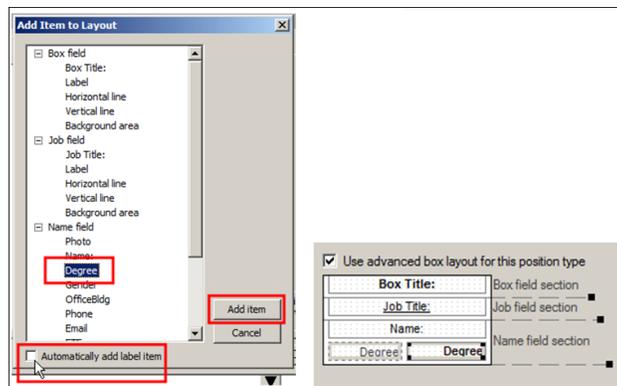


Figure 9.

Placing Text Outside the Chart Box

1. Click the perimeter of the box to select it. The pointer changes to a double-headed arrow.
2. Hold down the left mouse button and drag to a new size. Any field outside of the new box perimeter appears outside of the chart box when the chart opens.

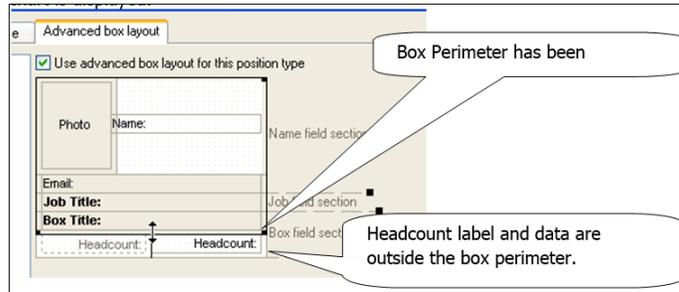


Figure 10.

Copying Format to Another Position Type or Style

You can copy a format layout from one position or style to another.

1. Click the **Copy layout** button at the bottom of the **Advanced box layout** tab.

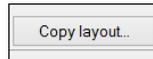


Figure 11.

The *Copy Box Layout* dialog opens.

2. Select a position type or style and position type

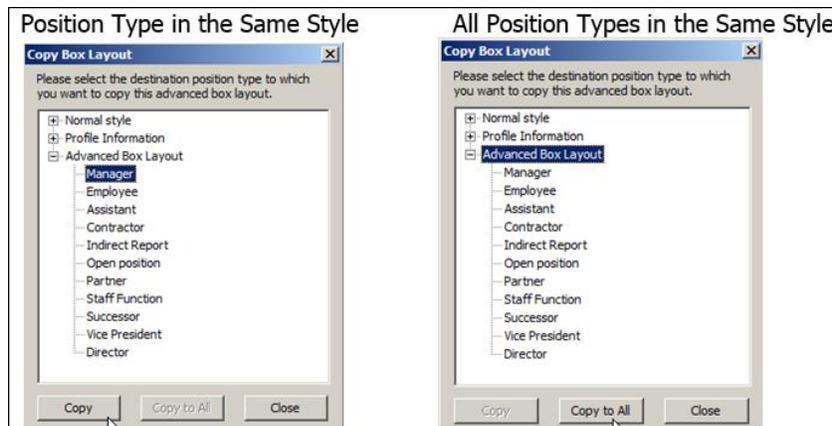


Figure 12.

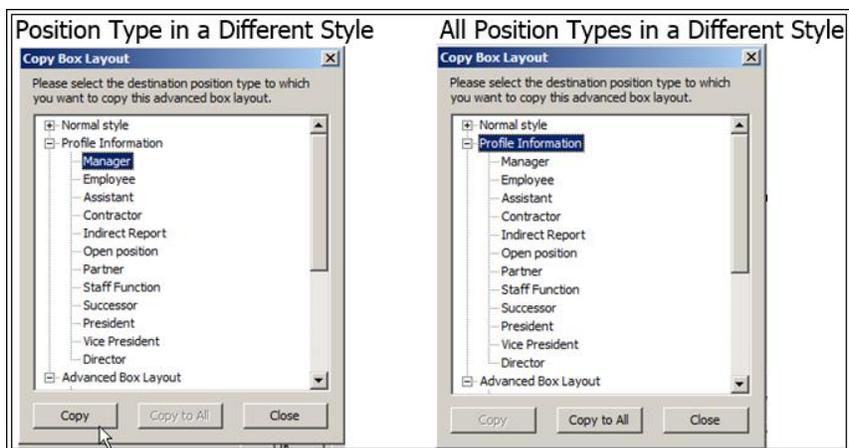


Figure 13.

3. You can undo the change by selecting the position type or style and clicking **Reset**.

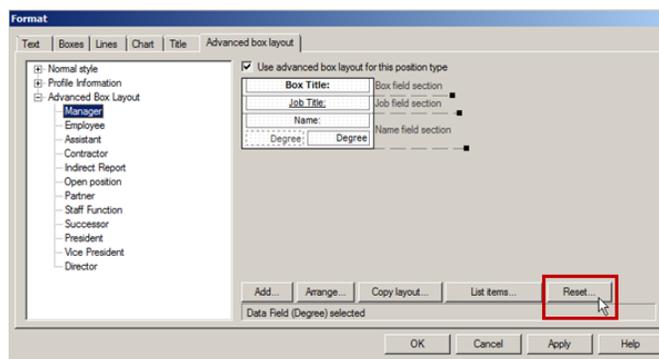


Figure 14.

Adding Lines and Adjusting Field Positions

You can adjust the positioning of data fields and lines after you have been added or modified them in the chart box.

1. Select the element you want to move or adjust and click on it. The element display a black square in each corner of the field, or, if a line, at each end of the line.

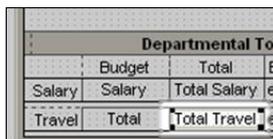


Figure 15.

2. Place the mouse pointer on the element. A four-headed arrow indicates that you are in the correct position to move the element.

Hold down the left mouse button and drag the element to the new location.

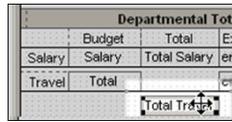


Figure 16.

- Place the mouse pointer on the edge of an element you want to resize. A double-headed arrow appears, pointing in the directions you can drag and drop the element to increase/decrease its size.

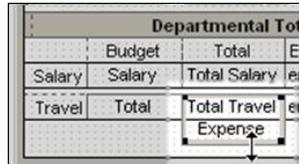


Figure 17.

Note: If you place an element on top of another element, you must move the top one out of the way in order to work with the underlying element.

- Grab the section sizing handle if you need to make more room in the box area. Use the white space to park element until you are ready to reposition them within the chart box.

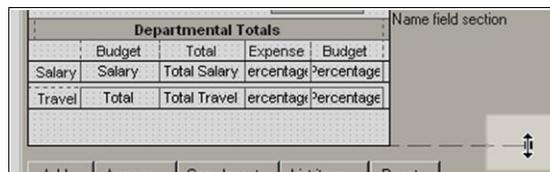


Figure 18.

Removing Advanced Box Layout Settings

If you decide not to use the Advanced Box Layout settings in the chart, you can remove that formatting.

- Click **Format** in the main menu then select the **Advanced Box Layout** feature.
- Select the position type you have formatted and click the check box to clear the **Use advanced box layout for this position type** feature.

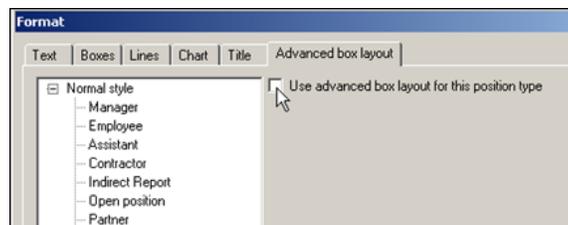


Figure 19.

- Repeat step 2 for each position type formatted with the *Advanced Box Layout Editor* then click **OK**.

Using Background Colors for Box Areas

- Click **Format** in the main menu and select the **Advanced Box Layout** option.
- Select a position type you want to modify and click the **Use advanced box layout for this position type** check box.
- Make changes, such as adding fields or arranging field display order, then click **Add** at the bottom of the dialog. The *Add Item to Layout* dialog opens.
- Select **Background area** and click **Add Item**.

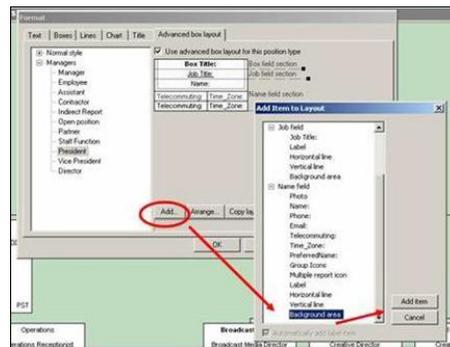


Figure 20.

- In the **Advanced box layout** tab, drag the corners to size the background area.
- Double-click the background area to open the *Background Area Properties* dialog.
- Select the **Default color** you want to use.
- Select the **Apply conditional color** check box to choose the color based on group membership.

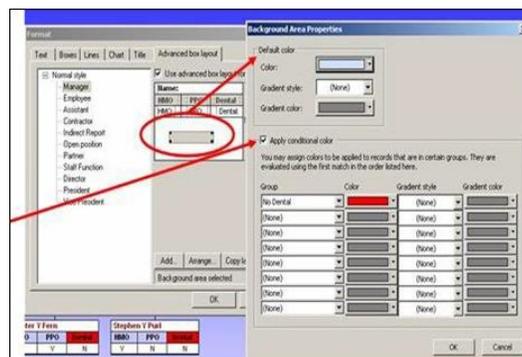


Figure 21.

See the Search and Group document for detailed information.

- Click **OK** to accept the color changes and click **OK** again to close the Format dialog and to see the results in the chart for the modified position type.

- Open the *Advanced Box Layout Editor* again to copy the new format to additional position types, if applicable.

For example:

- A has health insurance and dental
- B has health insurance and no dental
- C has no health insurance and no dental

Gregory K. Pink		
HMO	PPO	Dental
N	Y	Y

Leslie T. Reder		
HMO	PPO	Dental
N	Y	N

Kayla K. Melton		
HMO	PPO	Dental
N	Y	Y

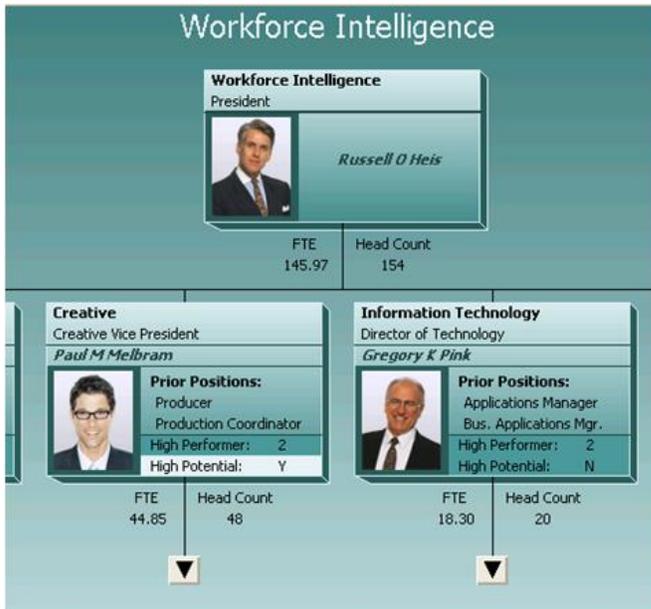
Carol M. Jones		
HMO	PPO	Dental
N	Y	N

Spender T. Wright		
HMO	PPO	Dental
N	N	N

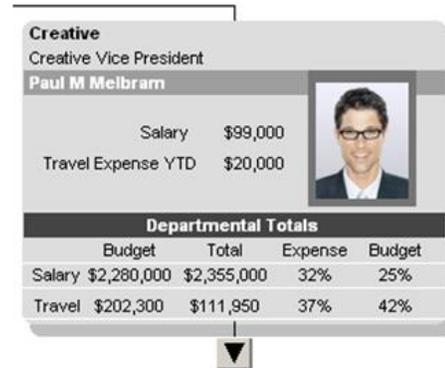
Ki G. Wang		
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Figure 22.

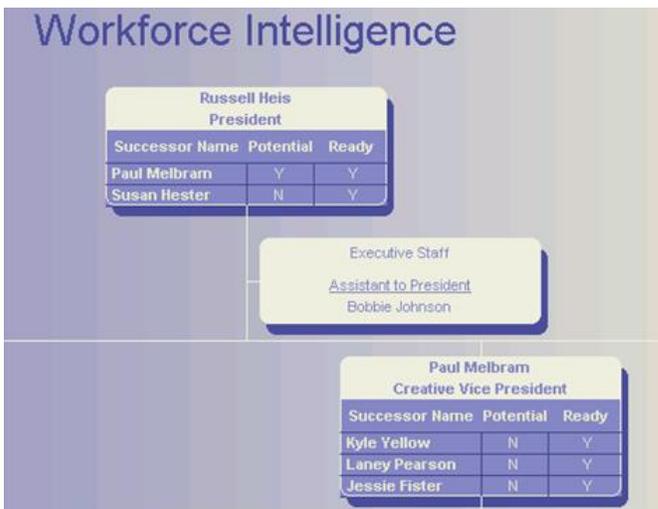
Advanced Box Layout Editor Examples



Example 1



Example 2



Example 3



Example 4