

# Company Ladder™

*Presentation-Quality Org Charts in Any Style—Automatically!*



SOFTWARE  
CORPORATION



# **Company Ladder**

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## **User's Guide**

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# Introduction

Welcome to Company Ladder™, a convenient, time-saving package that lets you create, modify, and print presentation-quality organization charts. You type in the text and Company Ladder automatically formats the chart—draws boxes, connects lines, adds space between boxes, and positions text. You can insert, delete, or move individual positions, a range of positions, or entire departments in one easy step—and an on-screen browse chart continuously updates and displays the company structure. The *Instant View* feature provides an on-screen preview of your chart, complete with updated lines, boxes, and spacing.

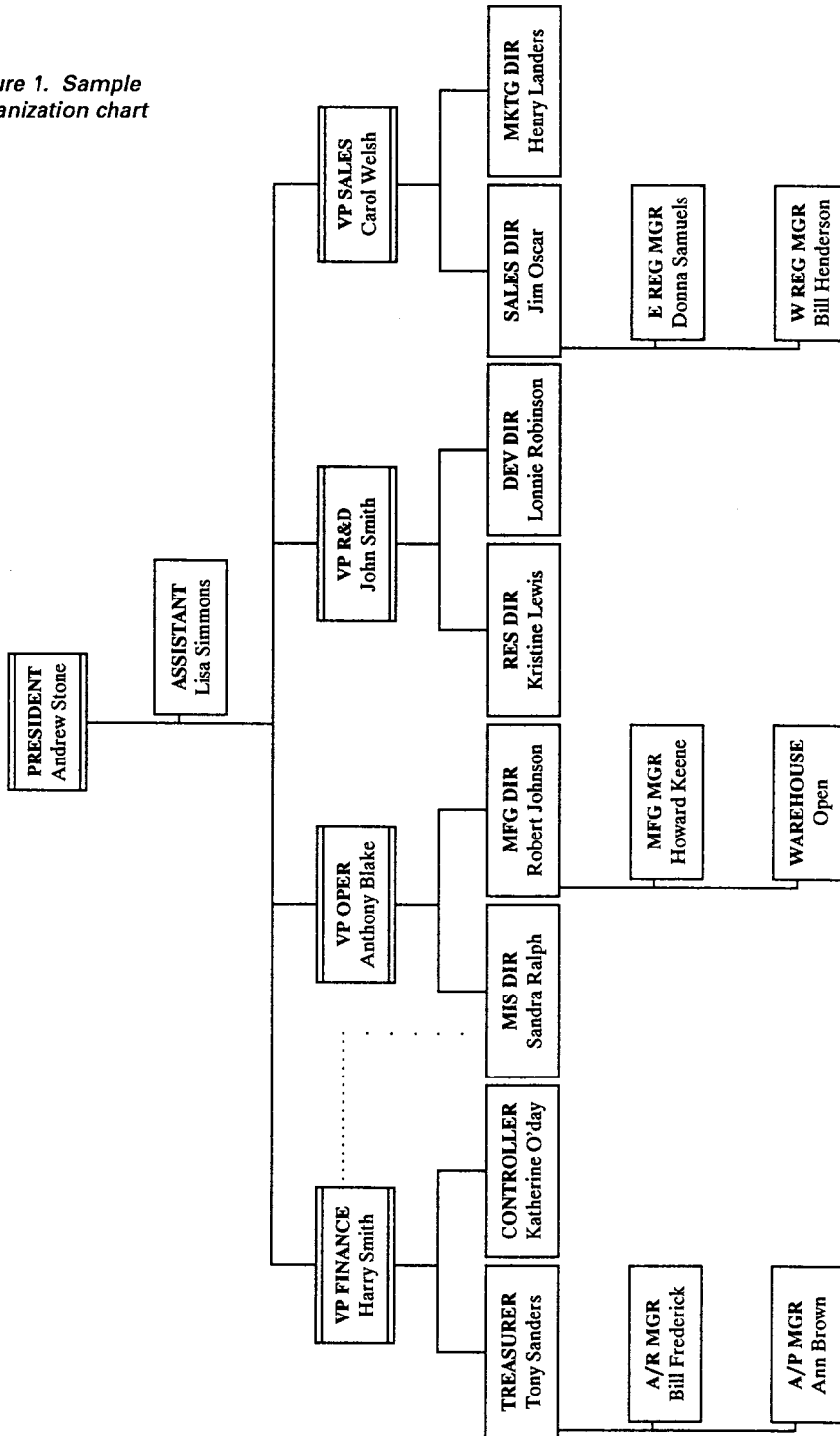
Company Ladder can chart the organization of even the largest companies and departments, with more than 2000 positions and up to 255 different levels. You can include salary, budget, commission, and other numeric information in any of 26 possible fields. Company Ladder instantly calculates numeric field data. Use it to count, sum up, and determine mean, maximum, and minimum values: You can easily analyze salaries, commissions, performance, and other variables by position, branch, rank, or a variety of other levels in the company's organization.

Company Ladder's professional-looking charts are suitable for any boardroom presentation or published report. Let Company Ladder automatically format your chart, or customize all or part of your chart's format by varying line, box, and chart styles. Using a laser printer and Times-Roman and Helvetica fonts (10 and 14 points), you can create sharp, 300 dpi proportionally printed charts. Bold, underline, and italic type styles let you add emphasis and variety to your text, box titles, and chart titles. Output quality is limited only by your printer's capabilities.

You can use Company Ladder in a variety of other applications—print a diagram of the directories and files on your hard disk; produce a tree diagram for classifying plants, animals, or books; print diagrams for various organizations, such as schools and clubs; or even organize your wine cellar. Just use your imagination and Company Ladder will do the rest.

# WILDER SOFTWARE CO.

Figure 1. Sample organization chart



## System requirements

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We recommend using an IBM™-PC-compatible, dual-disk or hard disk system with at least 384K total system memory. Company Ladder operates with PC-DOS or MS-DOS, version 2.1 or later, and supports all video cards (monochrome and color).

You can output Company Ladder charts to a variety of printers and plotters. For a complete list of supported printers, please see Chapter 6, "Printing and previewing charts."

## Where to go from here

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Before you begin working with Company Ladder, be sure to make a working copy of the Company Ladder distribution diskette and/or copy the diskette onto your hard drive. The remaining sections of this chapter explain how to do this.

Once you've installed the program, refer to the following chapters for useful information about creating, editing, formatting, and printing:

*Chapter 2* provides all the information you need to move around in the program.

*Chapter 3*, a short tutorial, introduces you to many Company Ladder features and functions.

*Chapter 4* explains how to create and modify an organization chart.

*Chapter 5* describes Company Ladder's default formatting features and explains how you can customize the format of your charts.

*Chapter 6* explains how to preview and print charts.

*Chapter 7* highlights the ways in which you can perform calculations on fields included in your organization chart.

# Installing Company Ladder

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Your Company Ladder package includes a distribution diskette that contains the Company Ladder program and its associated files:

LADDER.EXE	the Company Ladder program
LADDER.HLP	the context-sensitive help file
LADDER.FNT	the font file for dot-matrix printers
LADDER.WTB	width tables for proportional fonts
EXAMPLE.LAD	a sample organization chart
EXAMPLE2.LAD	another sample chart
READ.ME	a summary of Company Ladder installation instructions.


You'll copy these files onto your hard disk (if you have one) and/or make a working copy of this diskette. Once you've copied the Company Ladder distribution diskette, be sure to keep it in a safe place.

## On a hard disk

If you use a computer with a hard disk, you should first create a subdirectory for your Company Ladder files and the charts you'll create. Once you create a subdirectory (for example, CL), you'll copy the files from your Company Ladder diskette to the Company Ladder subdirectory.

Consult your system software manual if you are unsure about the commands for creating subdirectories and for copying files.

**Example:** You want to place the program and files on your hard disk in a subdirectory on the C drive, named "CL."

1. Insert the Company Ladder diskette in drive A.
2. Type each of the following commands (as required) exactly. Press  (the ENTER key) after each command:

C:	(to move to drive C, if necessary)
CD \	(to move to root directory of Drive C)
MD CL	(to make new subdirectory, CL)
CD CL	(to move to new subdirectory, CL)
COPY A:*. *	(to copy contents of drive A disk to CL)

## Floppy disk systems

First, you should make a working copy of your Company Ladder diskette. Save the original diskette as a backup and use the working copy to run Company Ladder.

To make a working copy, format a blank diskette and then copy Company Ladder onto the formatted diskette. Consult your system software manual if you are uncertain about the commands to format and copy.

**Example:** You have two diskette drives and want to make a working copy.

1. Insert your PC-DOS or MS-DOS diskette into drive A and a blank diskette into drive B.
2. Type each of the following commands (as required) exactly. Press  (ENTER) after each command.  
**A:** (to change to drive A, if necessary)  
**FORMAT B:** (to format the diskette in drive B)
3. When formatting is complete, remove the DOS diskette from drive A and replace it with the Company Ladder diskette.
4. Type **COPY A:.\* B:** and press . This command copies the contents of the Company Ladder diskette in drive A to the diskette in drive B.
5. Use the working copy whenever you run Company Ladder.

## Changing the default path

By default, Company Ladder stores your charts on the same diskette (floppy-disk systems) or directory (hard-disk systems) as the one in which you've copied the program files. If you want your charts stored in a different location, follow the instructions below. If you want to store charts in a different directory (as opposed to a different disk), make sure you create the directory before you begin this procedure.

1. Change to the diskette or directory that contains the Company Ladder program files you copied from the master diskette.
2. Type **LADDER** and press  to start Company Ladder.
3. Press  to pull down the **F6-File** menu and then type the number 7 to choose the "Set default path" command.

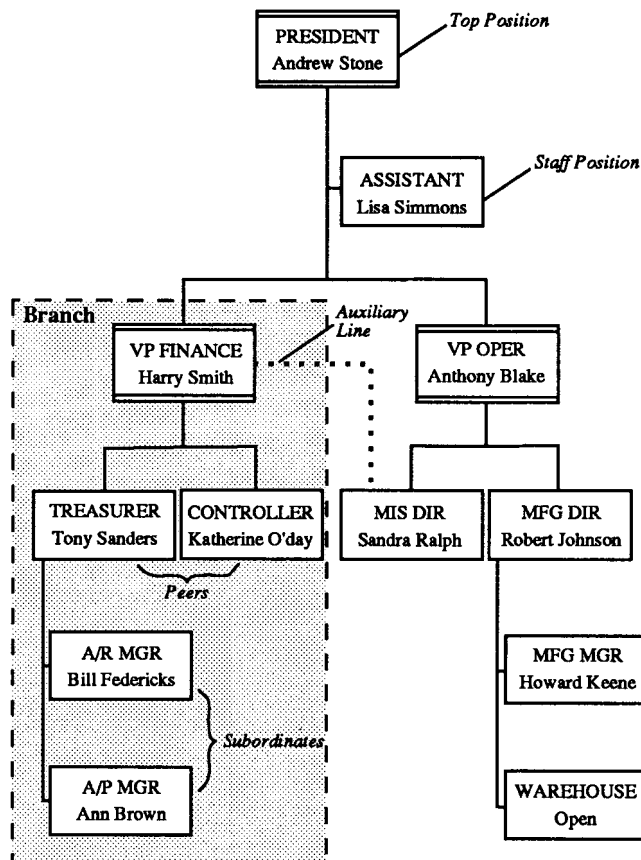
4. Type the desired path name and then press **(F10)** to return to Company Ladder's Personnel Input window (explained in Chapter 2). Whenever you retrieve or save chart files, Company Ladder will use the path you entered instead of its default path. For example, to store files on drive B, type **B:** when prompted for the default path. To choose the CHART directory on your hard disk C, type **C: \CHART**.

This chapter provides the basic information you need to get started—a brief definition of Company Ladder terms, an overview of how to run the program, a list of keys you'll use frequently to get around Company Ladder screens, and general information about getting help. Once you read through this chapter, we recommend that you go through the tutorial in Chapter 3.

### Some important terms

Most of the terms used in this manual are self-explanatory, but to avoid any confusion, Figure 2 and the following text define commonly used Company Ladder terms.

Figure 2. Company Ladder terms



- **Branch:** The *current position* and all positions that report directly to this *position*, including staff positions.
- **Current Position:** The *position* that is currently highlighted on the Browse Chart. Positions that you insert, move, exchange, or copy are always relative to the current position.
- **Default:** The “automatic” or pre-defined value. Defaults (such as line and box style) are listed on and can be reassigned from the F4-Defaults menu.
- **Field:** An on-screen area that stores information. Each position may have up to 26 fields, labeled A-Z, in which you enter personal information.
- **Field label:** The name or title of a *field* (for example, the field label for the Name field is *Name:*). You can specify whether or not a field label will print on your chart.
- **Name:** The name of the person you are inserting in the company organization chart.
- **Order:** Relates to the “Auto reorder subordinates” function on the F3-Format and F4-Defaults menus. *Subordinates* may be sorted alphabetically, in ascending or descending order, by *Name*, *Position*, or any of the fields from A to Z.
- **Peers:** Positions that report to the same person/*position*.
- **Position:** The personal data associated with a box in the company organization chart (name, job/*position* in the company, miscellaneous comments, *rank*, and whether or not it is a *Staff position*).
- **Range:** Represents a particular level of your chart (for example, a *branch*, *peers*, the current *rank*, etc.) when setting up a field for calculation.
- **Rank:** A number indicating a position’s order in the “chain of command.” For example, the *Top* position has a rank of 1, the top position’s *subordinates* have a rank of 2, etc.
- **Staff:** A *position* that does not fall directly in the chain of command (such as secretaries and administrative assistants).
- **Subordinate:** A *position* that reports directly to the *current position*.
- **Top:** The highest-ranking *position* on the company organization chart.
- **Window:** A bordered area of the screen. The *active* window (the window in which you are working) has a double border around it.



## Running the program

You must start Company Ladder from either a working copy of the Company Ladder diskette or from the Company Ladder sub-directory on a hard disk. With floppy-disk systems, you need to start up your system with your DOS diskette, and then replace this diskette with a working copy of your Company Ladder diskette.

To start Company Ladder, type **LADDER** and press **↵**. The screen displays the last chart you edited, exactly as you left it. If you haven't yet created a chart, the screen displays a blank Personnel Input window and an empty Browse Chart. In either situation, Company Ladder places the highlight in the *Name* field of the Personnel Input window, where you can enter or edit information.

**Note:** If nothing appears on your screen, press a Z to change the screen-color combination. Each time you press a Z, the display colors will change.

If you have a CGA monitor and notice screen flicker (snow), press **F4** to pull down the **F4-Defaults** menu, type 6 to select "Screen defaults," and use the keys noted at the bottom of the window to set *CGA snow protection* to On.




### The Personnel Input window




The Personnel Input window is the heart of Company Ladder. It allows you to enter information about each person in your organization and is the foundation from which Company Ladder builds your charts. When you display and enter information in this window, you are affecting the *current position* on the chart.

The Personnel Input window contains a number of fields: data-entry fields, *Rank* and *Staff* fields, and information fields (which cannot be edited directly).

Figure 3. Personnel Input window



Personnel Input	
A: Name: Andrew Stone	Rank: 1
B: Title: PRESIDENT	Staff: No
C: Comment: 87,500	
D: Total: @Sum(Branch,C)	Number of Reports: 5
E.	Line Style: Solid default
F.	Box Style: Shadow
G.	Chart Style: Horizontal default

**When a field is highlighted,** it is a data-entry field and Company Ladder is prompting you to enter information. Depending on the field label (the name of field), you can either enter information (e.g., enter a person's name in the the *Name* field) or change the information that is already there (e.g., change a person's title or salary information). You can move the highlight from field to field with the   and  keys. Chapter 4 explains how to create and edit charts.

**The Staff and Rank fields** display information that you can change. For example, *Rank* may be 1 and *Staff* may be set to No. The  key moves you to this area of the window; when you've highlighted the desired field, you can change the information displayed. To change a position's rank, simply type the desired rank number; to change *Staff* status, press the  or  key. If you change *Staff* to Yes, the position will appear to the side of, rather than below, the person to which this staff position reports.

**Information fields** display in the lower right side of the window. Company Ladder automatically calculates the Number of Reports field, based on the number of subordinates you add; therefore, you cannot change this field. The other fields are either based on Company Ladder's preset formatting defaults or on the formatting changes you've made from the **F3-Format** or **F4-Defaults** menus. See Chapter 5 for information on formatting.

**Tip:** There's an easy way to tell if you are required to type an entry or if you can cycle through available options and then choose the one you want.















- If you see a cursor (blinking underline or rectangle) in the field, you type information in the field.
- If you don't see a blinking cursor, use the  and  keys to view your choices and press **F5** to choose the desired option.

### **Entering and changing information**


Regardless of whether or not information displays in a data-entry field, you can enter information. If the current (highlighted) field is blank, you can insert information; if the current field contains information, you can insert, delete, or change the information

Table 1 lists the keys used to move from field to field, insert information, edit entries, and end a Company Ladder function.




Table 1. Editing keys


			Moves you to the previous or next field
			Cycles through options and turns checkmarks on/off
 is the Tab key			Advances you to the next column
 is the Shift keys			Moves you to the previous column
			Toggles between Insert and Overwrite mode
			Deletes the current character
			Accepts the information as entered and lets you continue adding information (Add Subordinates window only)
			Accepts the information as entered and returns to either the Personnel Input window or next pull-down menu
			Cancels the current function

## Choosing menus and commands



At the top of the Company Ladder screen, you'll see a menu bar that lists each Company Ladder pull-down menu. To display a menu and view the commands on that menu, press the appropriate function key. For example, to pull down the F2-Position menu, press .

Once you pull down a menu, you'll see a list of commands. There are two ways to choose a command:

1. Use the  and  keys to move the highlight to the desired command and then press .
2. Type the number listed to the left of the command name.

**Hot keys:** Some commands have a *hot-key* combination listed to the right of their name. Hot keys are command shortcuts. In essence, they let you bypass the pull-down menu and execute the command in one keystroke. For example, if you press  to pull down the F6-File menu, you'll see the "Save" command listed like this:

2. Save	<Alt-S>
---------	---------

<Alt-S> is the hot key for "Save." When you press this key combination (hold down the  key while pressing ), Company Ladder immediately saves the current organization chart; you don't have to pull down the F6-File menu and then choose the command.

The following list shows the available hot keys. You'll notice most of these keys at the bottom of the screen whenever they are available for use.

- AR A** Adds subordinates.
- AR B** Moves you into the Browse Chart, where you can use the arrow keys to quickly step through the structure of your chart as well as change the current position. Press **Esc** to return to where you were prior to entering the Browse Chart, or press **←** to select a new position.
- AR D** Moves Down and to the first person at the left on the next level of the organization chart.
- AR E** Lets you select from a list of Entries (values) already entered in this field for all other chart positions(e.g., displays all values entered, for all positions, in the *Title* field).
- AR F** Lets you choose the desired Function (numeric calculation) you want to perform (count, sum, mean, maximum, or minimum) and lets you specify a range for this function.
- AR G** Lets you choose and Go to a new position.
- AR I** Inserts a new position in the chart.
- AR L** Moves Left to the previous position on the current level.
- AR P** Prints the currently displayed organization chart.
- AR Q** Displays a Quick list of the current position's subordinates.
- AR R** Moves Right to the next position on the current level.
- AR S** Saves the displayed organization chart.
- AR T** Moves to the Top position on the organization chart.
- AR U** Moves Up to the position above the current position.
- AR V** Lets you View, on-screen, the printed format of your chart.
- AR Z** Changes the screen-color combination.

- The cancel key** The **Esc** key works as a cancel key. Whenever you change your mind about displaying a menu or choosing a command, you can press **Esc** and “back out” of whatever you were doing.
- Saving your chart** Whenever you create or modify a chart that you may want to use again, you should save it. Company Ladder will store your chart on disk, and will let you retrieve it by choosing its filename from a list of organization charts.
- To save your schedule, press **Alt S** or press **F6** and choose “Save” from the **F6-File** menu. Company Ladder will save your organization chart in the directory or on the diskette where the program resides (i.e., in the Company Ladder subdirectory on your hard disk or on the working copy of your Company Ladder diskette). If you want to specify an alternate location for storing your schedule files (for example, on a data diskette rather than the program’s working diskette), see the *Changing the default path* section at the end of Chapter 1.
- Printing** Before you can print an organization chart, you need to set up your printer. Chapter 6, *Printing and previewing charts*, explains how to do this and also explains how to set print options, view your chart on-screen (**Alt V**), and print a paper copy of your chart (**Alt P**).
- Leaving Company Ladder** When you want to leave Company Ladder, press **F7**. If you’ve made changes that haven’t been saved, Company Ladder asks if you want to save the changes. Press **Y** to save and then exit or press **N** to exit without saving your changes.

## Getting help

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Company Ladder is easy to use, but you may have a few questions in the beginning. You can always refer to this guide, but you can also get on-line help when you need it.

- On-line help** Whenever you’re unsure about what command to use or what to do next, you can press **F1** for Company Ladder’s context-sensitive help.

**Product support** If you can't find the answer to a question in this manual, our Product Support Department can help you. Have your computer turned on and this information handy before you call:

- your name and address
- the product name and version number
- your computer make and model, the amount of RAM installed, the type and capacity of the hard disk and floppy drives, the display adapter and monitor type, printer name and model number, and list of peripherals attached
- DOS version number
- contents of your CONFIG.SYS and AUTOEXEC.BAT files

Call Product Support with a clear description of your problem at (415) 345-0551. In the United Kingdom, call 0276-65272.

## **Backing up your charts**

---

You should make a backup copy of your charts on a regular basis. To do this, copy the \*.LAD files to a separate diskette.

Once you run the program and save a chart, you may notice a new file on your disk—LADDER.BAK. Company Ladder automatically creates this file whenever you start a chart-building session. It is a copy of your on-disk chart information, before you start making changes. To recover from work lost due to a power outage or any other disaster, simply retrieve the LADDER.BAK file.

This chapter leads you through editing the sample organization chart provided on the Company Ladder diskette. After completing this tutorial, you should have a good idea of how to create an organization chart, customize chart format, edit information, and print a sample chart.

Before you begin this tutorial, be sure to

- install Company Ladder as explained in Chapter 1
- read through Chapter 2

## Preview the chart

---

The figure on page 2 is a printed example of the sample chart we'll be editing in this tutorial. To display this chart on your screen

1. From the Ladder directory, type **LADDER** and press **r** to start Company Ladder.
2. Press **F6** to pull down the **F6-File** menu to retrieve. When prompted for a chart name, type **EXAMPLE.LAD** and press **↵**.

You'll notice the *Personnel Input* window and below it you'll see the Browse Chart, which is a modified version of the printed example in Chapter 1. Press **Alt V** or choose "View chart" from the **F5-Print** menu to see the on-screen version of the WILDER SOFTWARE CO. organization chart.

**⇧** is the Shift key.

Since the entire chart doesn't fit on a single screen, use the **PageUp**, **PageDown**, **↵**, and **⇧ ⇧** keys to move up, down, right, and left, one screen at a time. To move in smaller increments, use the **↑**, **↓**, **←**, and **→** keys.

The **Esc** key cancels any Company Ladder function. When you want to leave the on-screen preview, simply press **Esc**.

## Move around the chart

---

It's important to understand that everything you do is relative to the *current position*. The current position is the position that appears in the Personnel Input window and the position that is highlighted on the Browse Chart.

There are three different ways to change the current position. First, press **AR** **D** to move down to Lisa Simmons, the Assistant. Press **AR** **R** to move down and to the right—you're now on Harry Smith's position. Pressing **AR** **R** again moves you to Anthony Blake, **AR** **L** takes you back to Harry Smith, and **AR** **U** moves you up to Andrew Stone. Wondering why you didn't move "up" to Lisa Simmons? The vice-presidents report to the top position—Andrew Stone; Lisa Simmons fills a staff position, which we'll explain a little later.

The **AR** **G** hot key offers another way to move around the chart. Try pressing **AR** **G** and then choose *Controller*. Katherine O'Day is now the current position.

To experiment with the third Browse method, press **AR** **B**. Notice the double border around the Browse Chart, which means it is the active window. Use the **↑**, **↓**, **←**, and **→** keys to move around and then highlight Ann Brown (A/P Manager). Press **FD** or **←** and you'll exit the Browse Chart, with A/P Manager in the Personnel Input window.

You may notice that some of the branches (including Ann's) are organized vertically on the screen preview, yet display horizontally on the printed and on-screen versions of the chart. The Browse Chart displays structure and field information only; it doesn't display any box, line, or chart styles you may set. Later in this tutorial, we explain format and style options.

## Insert a position and add subordinates

---

Wilder Software's Finance department is expanding. The company hires Lee Smith as Payroll Manager and Pat Collins as an assistant. Lee will report to Tony Sanders and be a peer of Bill Fredericks and Ann Brown. Pat will report to Lee Smith and have the status of a "staff" position.



Assuming you've been following this tutorial, Ann Brown should be the current position. Press **AR** **I** or choose "Insert" from the **F2-Position** menu. You now have the option to insert a position above, below, to the left, or to the right of the current position. Add Lee Smith to the left of Ann Brown, press **F10**, and then type Lee's title. Press **↓** and enter Lee's name, first name first. Don't worry about the other fields right now—we'll add field information a little later.

To add Pat Collins as Lee's subordinate, press **AR** **A**. You'll see the subordinates window, which is similar to the Personnel Input window. Add the information for Pat Collins and then press **↵** and **↓** to move to the *Staff* field. Press **→** to see the field change from *No* to *Yes*.

This is the only subordinate we're going to add, so press **F10**. If a position has other subordinates, you could press **F9** to continue entering subordinates and then press **F10** when you completed subordinate entries.

As you can see, the Browse Chart displays the updated organization. Lee Smith's position appears between Bill Fredericks and Ann Brown, and Pat Collins appears below and to the right of Lee Smith. To get an idea of how the chart would now print, press **AR** **V**.

## Change box style

---

By default, Company Ladder prints a single-line box for each position. Before we copied this sample file on your diskette, we used the **F3-Format** menu's "Style" command to override the default box style and print "Top-Double" boxes for the top position and the VP positions. Let's go back to the Personnel Input window (press **Esc** from the on-screen preview chart) and look at Company Ladder's formatting options.

Instead of a Top-Double box, let's use a Shadow format for the top position's box. Press **AR** **T** to move to the top position, press **F3**, choose "Style," then "Box," then "Shadow" and then "Current" (or "Top," since we only want to affect the current (top) position). Press **Esc** and then **AR** **V** to view the results.

You can selectively change the box, line, or chart style for any part of your chart. The process is the same as the one we just went through. If you want a formatting change to affect all positions throughout the chart, and all positions you add after-













ward, select the “Style” command and options from the **F4-Defaults** menu instead of the **F3-Format** menu. The **F3-Format** menu commands affect only specified parts of your chart; they do not affect any new positions you insert.

## Change field labels and field formats

---

You’ve probably noticed that field C, labeled *Comment*, displays a dollar amount for each position. That figure is the position’s current salary, so we’re going to use the “Field labels and format” command to change that field label to *Salary*. Later in this tutorial, we’ll calculate the total salaries for each branch, and print that total in each of the VP’s boxes.

Next, for all VP positions, we’ll label field D *Div Salaries* and specify that both the label and data should print on the chart in italics. Then we’ll make it a Money field, and tell Company Ladder we want a comma to print as the Thousands separator. To set up these field labels and field formats

-  is the Shift key.
1. Press  and choose “Field labels and formats.” Notice the instructions at the bottom of the window. The arrow keys move you from row to row, Tab moves you to the next column, and Shift-Tab moves you to the previous column.
  2. Highlight the *Comments* field and then type **Salary**. Press  to delete the extra characters.
  3. Now press  and you move to the *Print* column. In this and all remaining fields in the row, you can press  or  to display and cycle through available options. When the field displays the value you want, simply press  to move to the next column. The *Print* field currently displays *No*, which means that neither the salary data nor the label will print on the chart. This setting is okay, so press  to move to the next column.
  4. Since we don’t want to print each individual salary on the chart, we won’t worry about type styles or justification. Press  (4 times) to move to the *Type* column.
  5. We’ll be entering monetary information that we want to calculate, so we need to change the field type from Text to *Money*. Press  twice. It’s easier to read large numbers if a comma separates the thousands, so  to the Thousands column and press .

6. Review what you've done and when you're ready, press **F10** to accept your changes and return to the Personnel Input window, which now displays the new field labels.

Now let's use the "Field labels and format" command on the **F3-Format** menu to change the field D label for all VP positions. Before we do this, though, we need to make one of the VPs the current position.

1. Using one of the ways you learned earlier, change the current position to Anthony Blake.
2. Choose "Field labels and format" from the **F3-Format** menu.
3. Highlight field D, type **Div Salaries**, and press **F10**. We want both the field data and the label to print, so press **→** twice to select the *Field & Label* option.
4. Press **F10** twice to move to the *Ital.* column and press **→** to display a check mark. This tells Company Ladder to print the information in italics, if your printer has that capability.
5. As you did for the *Salary* field (field C), make field D a *Money* field, include the Thousands separator, and then press **F10**. The list of options that appears lets you choose which positions to add the field label to. The reason is that we're working with the **F3-Format** menu, which lets you selectively format positions within the chart.
6. Choose "Rank" to specify all positions that share the same rank as Anthony Blake. The *Div Salary* field will now appear in the Personnel Input window of each VP position.
7. If you preview your chart at this point, you'll notice that Lisa Simmons' box also includes the *Div Salary* field label. She's not a VP, but she does share the same rank. To eliminate this field label:
  - Select Lisa, press **F3**, and choose "Field labels and formats."
  - Delete *Div Salary*, move to the *Print* field and toggle it to *No*, move to current, and press **F10**.

## Total salaries for each branch

---

In this part of the tutorial, we are going to total the salary information displayed in field C and print each division's salary total in its respective VP's box. For example, Harry Smith's box will display the total amount of salaries paid to Smith and his employees in the Finance division.

1. Highlight any VP position on the chart. Let's move to Harry Smith, VP FINANCE.
2. Move to field D, *Div Salaries*, and press **Alt** **F**. This displays a menu of function options from which to choose. Since we want to total the salaries entered in field C, choose "Sum" and press **F10**.
3. We want to total salaries for the current branch (Harry Smith's division), so choose "Branch" and press **F10**.
4. Field C is the field containing the information we want to sum, so type C and press **F10**. When you return to the Personnel Input window, you'll see that Company Ladder has inserted the formula in field D @Sum(Branch,C). As soon as you move to another field in the window, field D displays the result of the calculation: \$509,000.

## Copy a field

---

We could now, in turn, repeat the previous exercise for each VP position, but there's an easier way. We can copy the formula inserted in field D to all of Harry Smith's peers. Assuming that Harry Smith is the current position:

1. Choose "Copy fields" from the **F2-Position** menu, type D to copy the data entered in field D, and press **F10**.
2. Now Company Ladder asks you which positions should receive this field data. Choose "Peers" and press **F10**. Preview your chart and then return to the Personnel Input window.

## Save your chart

---

You've done a fair amount of editing to this chart, so you should save it. The hot key **Alt S** will do this for you, but let's save this chart as *MYEDIT.LAD*. That way, you'll leave the *EXAMPLE.LAD* chart intact for another new user, and be able to store your modified chart in its own separate file. Choose "Save as..." from the **F6-File** menu. When prompted for a file name, type *myedit* and press **F10**. Once Company Ladder saves the chart to disk, it will return you to the Personnel Input window of the *MYEDIT.LAD* file.

## Print your chart

---

The **Alt V** hot key lets you preview your chart on-screen, but let's now print it on paper. Before we do, you need to tell Company Ladder what type of printer you're using. Choose "Select printer" from the **F5-Print** menu, move through the list, highlight your printer, and then press **F10**. Now tell Company Ladder which port your computer uses to communicate with your printer and press **F10**.

To familiarize yourself with Company Ladder's numerous print options, choose "Print options" from the **F5-Print** menu. After viewing the first screen of options, choose "Page settings..." and look at how Company Ladder lays out each page. If your printer supports multiple fonts and type styles, look at the "Typestyles..." options as well.

When you're ready to print, make sure your printer is ready, press **Esc** and then press **Alt P**. If you want to suspend printing at any time, press **Esc**. Press **Esc** again to cancel printing altogether; press **F10** to resume printing.

## Move a position and clear an auxiliary line

---

The "Move" command on the **F2-Position** menu lets you move a position or branch from its current location to another area of your chart. For example, let's move the MIS Director, Sandra

Ralph, to report to Harry Smith, the VP of Finance. Make Sandra the current position, choose "Move" from the **F2-Position** menu, and choose "Position." Company Ladder then prompts you for her new location. Choose "VP FINANCE" and then choose "Below chosen position." You could just as easily make Sandra a peer of Harry Smith by moving her to the left or right of the VP FINANCE position.

If you preview the chart on-screen, you'll see that the auxiliary line between Harry Smith and Sandra Ralph is no longer necessary. It was originally there to show that while she reported directly to Anthony Blake, the VP of Operations, Sandra also worked with Harry Smith, the VP of Finance. Now that Sandra reports directly to Harry, we can clear this auxiliary line.

Choose "List/clear auxiliary lines" from the **F2-Position** menu. The only line listed is the one we're discussing, so press **F10** to clear this line. To exit this menu, press **Esc**.

## Create a new chart

---

With the experience you've gained in this tutorial, you should be able to create a chart on your own. You can either

- Edit the information on the MYEDIT.LAD chart to reflect your company's organization and then save your edits as another file name.
- Or choose "New chart" from the **F6-File** menu and start from scratch. Company Ladder will ask you if you want to save your changes. If you wish to save your changes press "Yes", otherwise press "N" and Company Ladder will clear the screen.

When you use Save As to save your new chart, Company Ladder will prompt you for a file name. Type a unique chart name (otherwise you'll write over any chart with the same file name) and press **F10**. Otherwise, Company Ladder saves the file under the default file name, NONAME.LAD.

When you want to edit a chart that you've previously stored on disk, you need to *retrieve* it. To do so, choose "Retrieve" from the **F6-File** menu, type the name of the chart you want to edit, and press **F10**.

# Creating and editing charts

This chapter explains how to create a new organization chart and how to retrieve and make changes to an existing chart.

## Creating a new chart

---

When you start Company Ladder, the screen automatically displays the last organization chart on which you were working. When you want to create a completely new organization chart:

1. Press **F6** and choose "New chart" from the F6-File menu.
2. The screen now displays the file name NONAME.LAD in the upper left corner, displays the Personnel Input window, and highlights the *Name* field. The Browse window displays an empty box.

### What will you enter?

Company Ladder automatically labels the first three Personnel Input fields Name, Title, and Comment, respectively. Fields D through Z are not labeled. All fields are preset for alphanumeric entry.

Think about the type of information you want to record and optionally print on your chart. In addition to text entries such as name, title, employee ID, telephone number, or other data that will not be calculated, you can include numeric data that you want to calculate, such as salary, commission, or budget information. If you choose to add such information, you'll need to set up the field(s) to accept numeric or monetary data or you'll receive an error message. The *Field labels and format* section of Chapter 5 explains how to do this, how to change the label of a field (from *Comment* to *Salary*, for example), and how to specify whether or not a field should print on the chart.

### Add the first position

When you create a new chart, Company Ladder assumes the first position you add will be the top-ranking position and that all other positions will be subordinate to this top position.

1. Type the top position's name, just as you want it to print on the chart (maximum 255 characters) and then press **↵**. The highlight moves to the *Title:* field.
2. Type the title for this position and press **↵**. You may decide later whether or not you want the title to print on the chart.
3. While the highlight is on the *Comment* field, you can type in a comment (such as annual salary, length of employment, number of reports, etc.).
  - Add as many comment lines as you wish, pressing **↵** to move from one field to the next.
  - When entering information to be calculated, be sure to use the "Field labels and format" command on the **F4-Defaults** menu to change the default field Type to Number or Money (see Chapter 5).
4. When you've completed entering the position's personnel information, you may start adding subordinates—the positions that report to the current position.

### Add subordinate position

Subordinates are positions that report directly to the current position. You can add a position's subordinates at any time:

- Once you insert a position (press **Alt** **I** and complete the Personnel Input window), you can press **Alt** **A** to add that position's subordinates.
- Or you can add subordinates later. Move to the position for which you want to add subordinates and then press **Alt** **A**.

In either case, Company Ladder displays a new window for adding the subordinate's personnel information.

1. Press **Alt** **A** and type the subordinate's personnel information. The field labels in the Add Subordinates window are the same as those in the Personnel Input window.
2. Once you've completed the subordinate's personnel information, you can press:



**F9** to continue adding subordinates. Company Ladder will refresh the window so you can add the next subordinate position.

**F10** when you've added all subordinates for the current position.

3. To display a quick list of the current position's subordinates press **Alt** **Q**. From this list, you can choose a subordinate as the current position,

Go on to the following section, *Editing a chart*, for information about inserting other positions, changing the current position, using the Browse Chart, and editing your chart.

## Editing a chart

---

### Retrieve an existing chart

When you want to display a chart you've already created (and it's not currently on the screen), choose "Retrieve" from the **F6**-File menu. Company Ladder will prompt for the name of the chart you wish to edit.

- Press **Esc** to display a list of all charts sharing the .LAD extension, use the arrow keys to highlight the desired chart, and press **Enter**.
- Or type in the name of the chart you want to retrieve and press **Enter**.

### Change the current position

The current position is the position on which you are currently working. All actions you take are relative to this position; for example, the "Insert" command prompts you for new-position location—above, below, to the left, or to the right—of the current position.

There are a variety of ways to change the current position:









- Press the hot keys listed at the bottom of the screen (e.g., **Alt** **D** to move down, **Alt** **G** to choose from a list of positions).
- Press a **B** (Browse Mode), move the highlight to the desired position on the Browse Chart, and press **F10** or **Enter** to select that position.




You may wish to change the current position so you can add subordinates for a different position or to customize the format of boxes in a particular branch of your chart.

## Browse through a chart

The Browse Chart continually displays updated information as you make changes to the chart. To move into this window and browse through your chart, press a B. You'll see a double border around the chart and the current position will be high-lighted. At this point you can use the keys listed in Table 3 to move through the Browse Chart.

Table 3. Browse keys



		Moves up or down one level
		Moves to the previous or next position on the same level
		Moves to the right-most or left-most peer
		Selects the new position
		Exits and returns to the previously selected position



**Changing the Browse field:** By default, Company Ladder displays the Name field in the Browse Chart. To display a different field, such as Title, choose "Screen defaults" from the F4-Defaults menu. Move the highlight to the *Browse field* option and then use the  and  keys to display the desired field. Press  to complete the command and return to the Personnel Input window.

**Tip:** If you just want to view the structure of your chart (no names or titles), you can enter a period in any unused field (such as Z), copy field Z to all positions in this chart (see *Copy field information* for details), and then set the Browse field to Z.

## Insert a position

You can add positions to your chart at any time. The new position will be inserted relative to the current position (that is, either above, below, to the left or to the right of the current position).

**Note:** It's important to understand the difference between inserting a position and adding a subordinate position. Use   when you want to add subordinate positions. Company Ladder will automatically determine the correct placement for the subordinate, below the current position.

When you use   to insert a position, you have greater flexibility in where Company Ladder inserts your position. For example, you can insert a peer to the left or right of a position. Be aware, though, if you insert a position below a current position that has subordinates, the new position will be inserted between the current position and its subordinates.

1. Make sure that the current position is the position above, below, to the immediate left or to the immediate right of the position you want to add. For example, if you want to insert a position to the right of Harrison Schreppel, make sure Harrison Schreppel is the current position.
2. Press **Alt** **I** or choose "Insert" from the **F2-Position** menu. Company Ladder prompts for the location for the new position.
3. Use the **Up** and **Down** keys to highlight the desired location and press **F10**. Company Ladder automatically inserts the position and highlights a blank box at the selected location in the Browse Chart.

**Tip:** To display a list of all entries made in a given field (e.g., all names or titles in your chart, the contents of field C for all positions in your chart, etc.), press **Alt** **E**. Once Company Ladder displays all entries for the current field, you can choose the desired entry and Company Ladder will automatically insert the field in the current position. This is particularly handy when many people have the same or similar job titles.

### **Copy field information**

You can easily copy field information from one position to one or more other positions in your chart. For example, you can copy information in field D to all positions that share the current position's rank.

1. Make sure that the current position contains the fields you wish to copy.
2. Choose "Copy fields" from the **F2-Position** menu.
3. Type in the letter of the field(s) you wish to copy and press **F10**.
  - If you want to copy two fields, separate each letter with a space. For example, to copy fields C and D, you type C D.
  - If you want to copy a range of fields, type the first field letter followed by a dash, followed by the last field letter to be copied. For example, C-F copies fields C through F; entering C-F I H copies fields C through F, field I, and field H.
4. Using the u and d keys, select the position to which you want to copy the selected fields and press 0. You can choose top, manager (the person to which the current position reports), peers, rank, direct subordinates, all subordinates, or everyone.

### **Auxiliary lines**

An auxiliary line lets you show a position reporting to more than one position. For example, Lee Smith may report to Pat Brown on finance matters and report to Arlin Scott on marketing issues. Instead of adding Lee Smith as a subordinate to both of these positions, you can add Lee Smith as a subordinate of Pat Brown and draw an auxiliary line from Lee Smith to Arlin Scott.

**Draw auxiliary line:** The "Draw auxiliary line" command on the **F2-Position** menu lets you draw an auxiliary line from the current position to any other position on the chart. When you choose this command, Company Ladder displays a list of position names from which to choose.

**List/clear auxiliary line:** This command, also on the **F2-Position** menu, lists the pairs of positions that share an auxiliary line. Using the earlier example, "List/clear auxiliary line" would display Lee Smith-Arlin Scott. To delete an auxiliary line, simply choose the line you want to remove and press **F10**. Press **Esc** to return to the Personnel Input window.

### **Move a position or branch**

You can move the current position or the current branch to another location on your chart. The only exception is the top position, which cannot be moved.

1. Make sure that the position or branch you want to move is the current position.
2. Choose "Move" from the **F2-Position** menu. When prompted, choose what part of the chart you wish to move and press 0. You can choose from the current position, the current branch, or all positions reporting to the current position.
3. Using the arrow keys, select the destination for the position(s) you are moving.
  - First, select the name associated with the desired destination.
  - Now specify whether you want to move the position/branch so that it reports to the selected name or appears to the left or right of the selected name.
  - Press **F10** to complete the command.

**Delete a position or branch**

You can delete the current position or the current branch from your chart. The only exception is the top position, which cannot be deleted.

1. Make sure that the position or branch you want to delete is the current position.
2. Choose “Delete” from the **F2-Position** menu. When prompted, choose what part of the chart you wish to delete—the current position or the current branch—and press **F10**. All positions that previously reported to the deleted position move up one level.

**Exchange positions**

You can switch the current position with any other position without affecting the structure of your organization chart.

1. Make sure that one of the positions you want to exchange is the current position.
2. Choose “Exchange two positions” from the **F2-Position** menu.
3. Using the **↑** and **↓** keys, select the “exchange” name and then press **F10**.

**Reorder subordinate positions**

The “Auto reorder subordinates” command on the **F3-Format** and **F4-Defaults** menus instructs Company Ladder to automatically sort and reorder subordinate positions. For example, you can specify subordinates to be listed in descending order, based on salary, or in ascending alphabetic order, based on last name.

To automatically reorder subordinates for all existing and new positions, choose “Auto reorder subordinates” from the **F4-Defaults** menu.

Choose “Auto reorder subordinates” from the **F3-Format** menu if you want to reorder subordinates for a particular part of your organization, or if the default is set to *Auto reorder subordinates*, and you want to turn it off for part of your organization.

Regardless of the menu from which you choose “Auto reorder subordinates,” Company Ladder prompts you for the sort criteria—Sort field, Ascending or Descending order, Last name first, and whether the sort should be case-sensitive.

**Save your chart**

Whenever you make changes to a chart and want to store the updated chart in a file on your disk, you should use the "Save" command on the F6-File menu (or press **Alt** **S**). Company Ladder will immediately save your chart to the filename displayed in the upper left corner of the screen.

The F6-File menu also contains a "Save as..." command that lets you save your chart under a different file name. For example, you may want to save your outdated COMPANY.LAD chart for sentimental reasons; just choose "Save as..." and give it another file name, such as JUNE89.LAD.

**Save a branch**

Sometimes it's useful to save a particular branch of your organization chart. For example, you might want to make a more detailed departmental organization chart.

To save a branch of your organization chart to its own file:

1. Make sure that the current position is the top of the branch you want to save.
2. Choose "Save branch" from the F6-File menu. Company Ladder prompts for the file name to which the branch will be saved.
3. Type a file name and press **F10**. Once Company Ladder saves the branch to the file name you specified, you return to the original chart.

**Append a chart**

You can combine two or more organization charts (or saved branches of organization charts) by appending chart files to the current organization chart. To do this, choose "Append" from the F6-File menu. When Company Ladder prompts for the chart to be appended, type the desired chart's file name and press **F10**.

**Clear the chart**

To clear all data from the current organization chart, choose "New chart" from the F6-File menu.

# Formatting your charts

Company Ladder offers a wide variety of formatting options to customize the appearance of your organization charts. You can choose a general format for all or any part of your chart, specify how lines print, choose from various box styles, change field labels, specify what information prints on your chart, set formats for entries in numeric and monetary fields, and customize the label(s) you attach to printed boxes.

## Preset, default, overriding formats

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Before you begin formatting an organization chart, you should understand the difference between Company Ladder's *preset defaults*, *default formats* set from the **F4-Defaults** menu, and the *format options* you set from the **F3-Format** menu.

- **Preset defaults**

Company Ladder is shipped with preset defaults for chart format (box style, line style, chart style, etc.) Your chart will be formatted per these defaults, unless you change them. The *Preset defaults* section lists each of the preset default formats.

- **Default formats**

The **F4-Defaults** menu contains commands to change the preset default formats; the defaults you set affect *all entries*, existing and new, except those positions expressly overridden with the **F3-Format** menu options. If you do not change any of the formats listed on the **F4-Defaults** menu, your chart will be formatted according to Company Ladder's preset defaults.

- **Overriding formats**

Format options set from the **F3-Format** menu selectively override the default formats on the **F4-Defaults** menu. **F3-Format** menu options affect *existing entries*, and only those you specify (top, manager, current position, peers, rank, etc.). All new entries will be formatted according to the default format options (set from the **F4-Defaults** menu).

**Preset defaults** If you don't choose any of the formatting commands on the F3-Format or F4-Defaults menus, Company Ladder will format your organization chart with its preset default values, as follows:

Box style	Single
Line style	Solid
Auxiliary line style	Solid
Chart style	Horizontal
Field A	<i>Name</i> , field data prints, no assigned type styles, left-justified format, text entry
Field B	<i>Position</i> , field and label prints, no assigned type styles, left-justified format, text entry
Field C	<i>Comments</i> , nothing prints, text entry
Fields D-Z	Unlabeled, nothing prints, text entry

Figure 4 provides examples of Company Ladder's various box styles and Figure 5 shows sample chart styles.

**Format options** You can change any of the preset formats using commands listed on the F3-Format and F4-Defaults menus. These two menus provide many of the same format options, as noted below:

- **Style:** Sets the style for boxes, lines, and/or overall chart layout.
- **Field labels and format:** Provides options to change field labels, specify what text should print, and the format for printed text.
- **Box labels:** Labels boxes with the value stored in a specified field, and lets you specify the location for box-label text.
- **Auto reorder subordinates:** Instructs Company Ladder to automatically sort and reorder a position's subordinates.

The difference is between the two menus in how their command options are applied to your chart. If you change any of the preset defaults from the **F4-Defaults** menu, you will affect all entries—you **cannot** specify the position(s) affected. Defaults are applied throughout the chart—except for those positions specifically formatted by options set from the **F3-Format** menu.



**F4-Defaults commands:** The **F4-Defaults** menu displays all of the commands listed above, as well as the following format-related commands:

- **Numeric symbol:** Lets you choose the default symbol to be used for currency values ( the dollar sign, \$, by default), the location for a specified currency symbol (at the beginning or the end of the field), the thousands separator (a comma, by default), and a placeholder for decimal values (a period, by default).
- **Screen defaults:** Provides screen-display options from which to choose—browse field, screen-color combinations, CGA detection (to reduce screen flicker on CGA monitors).
- **Display System Status**

**F3-Format commands:** When you set formatting options from the **F3-Format** menu, you are overriding the preset defaults or defaults set from the **F4-Defaults** menu. You also specify to what part of your chart you wish to apply your formatting changes—to the Top, the Manager to which the current position reports, the Current position, and so on.

The **F3-Format** menu lists all commands noted at the beginning of this section, as well as the following format-related commands:

- **Chart title:** Prompts for a chart title and the style for each line of text (bold, italic, underline, or a combination).
- **Reset to default:** Lets you reset the current format value to the default value. For example, if you use the **F3-Format** menu options to change everyone's box style to *Shadow* and then decide you'd rather have the default single-border box style, you can choose the "Reset to default" command on the **F3-Format** menu.

A more involved example is deciding you only want shadow boxes for positions with a rank of 2; all other positions should use the default single-border box style. If you've already set everyone's boxes to be in *Shadow* style, you could:

1. Choose "Reset to default" from the **F3-Format** menu, choose "Everyone," and press **[F10]** to set everyone to single-border boxes.
2. Select a position of Rank 2.
3. Pull down the **F3-Format** menu, choose "Style," choose "Box style," and then choose "Shadow."
4. Choose "Rank" and press **[F10]**.

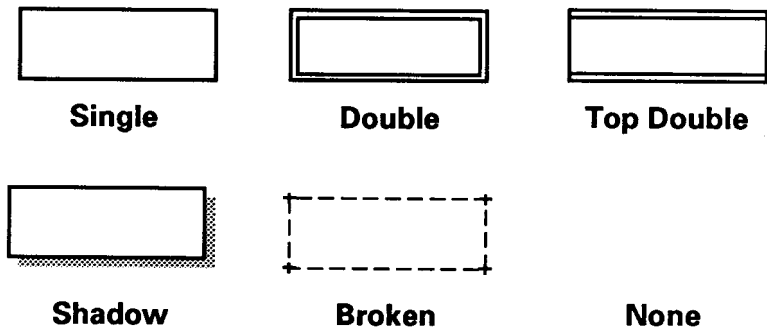
## Defining box, line, and chart style

---

The "Style" command on the **F3-Format** and **F4-Defaults** menu displays a list of options: Box style, Line style, and Chart style (general layout for your chart).

**Box style** To specify a style for chart boxes, choose "Style" from the **F3-Format** or **F4-Defaults** menu, choose "Box style," and then choose the desired style for boxes that will print on your organization chart. As shown in Figure 4, options are Single (the default), Double, Top Double, Shadow, Broken, or None.

*Figure 4. Box styles*

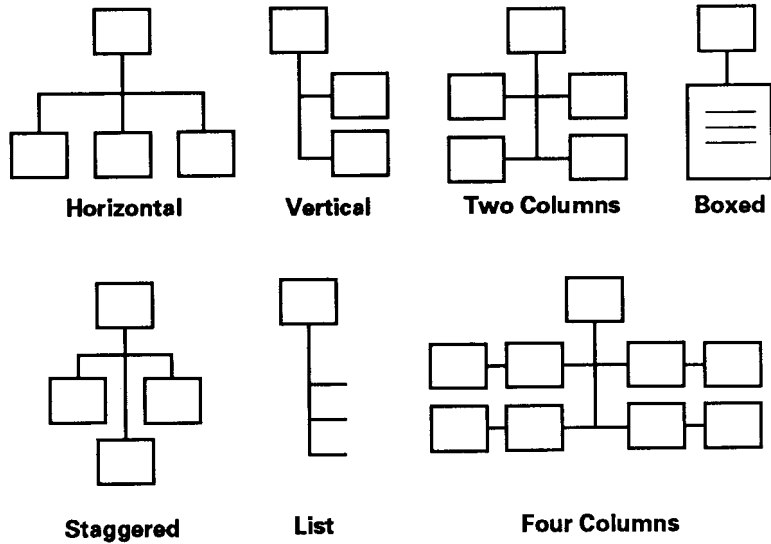


**Line style** To specify a style for lines, choose "Style" from the **F3-Format** or **F4-Defaults** menu, choose "Line style," and then choose the desired style for lines that will print on your organization chart. Options are Solid (the default), Dotted, Dashed, or None. If you are formatting lines in a particular part of your chart, you affect lines leading from the specified positions.

**Auxiliary line style** Setting auxiliary line style is identical to setting line style, except that the "Style/Auxiliary line" command is only available from the **F4-Defaults** menu.

**Chart style** To specify a general layout for your chart, choose "Style" from the **F3-Format** or **F4-Defaults** menu, choose "Chart style," and then choose the desired layout for your organization chart. As shown in Figure 5, options are Horizontal (the default), Vertical, Two Columns, Four Columns, Staggered, List, or Boxed.

Figure 5. Chart styles



## Field labels and their format

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Field labels are the names of fields contained in the Personnel Input window. By default, the field labels are A: Name, B: Title, and C: Comments (fields D through Z are not labeled). Using the “Field labels and format” command on the **F3-Format** or the **F4-Defaults** menu, you can

- Change a field name
- Specify what prints—just the data in the field, the field data *and* the label, or neither
- Choose the type style of printed text—bold, italic, underline, or a combination
- Specify whether printed text is left-justified, right-justified, or centered
- Specify the type of data to be entered in the field—text, money, or a number
- Specify where the decimal should appear in monetary or numeric fields
- Determine whether or not to print the thousands separator

**Change field labels** To change the name of a particular field, choose “Field labels and format” command from the **F3-Format** or **F4-Defaults** menu, highlight the field label you wish to change, and then type the desired replacement label. For example, you might change the *Comments* label for field *C* to *Salary*, add a *Status* label to field *D*, and so on. This makes it easy for you, and anyone else, to update the chart; you don’t have to remember what should be entered in each of the fields.

**What should print?** The Print column (to the right of the Field label column) lets you specify what aspects of the field you want to print on your chart. Choose “Field labels and format” from the **F3-Format** or **F4-Defaults** menu, highlight the desired field label, press **t** to move to the Print column, and then use the **←** and **→** keys to make your selection.

<b>Field</b>	Only the data entered in the field will print.
--------------	--

<b>Field &amp; Label</b>	The field label (e.g., Name) <i>and</i> the data entered in the field will print.
--------------------------	---




<b>No</b>	Neither the label nor the data entered in the field will print on the chart. This is useful for confidential fields.
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**Type styles for text** The *Type Style* columns (to the right of the *Print* column) let you specify the type style for text that will print on your chart.

Choose “Field labels and format” from the **F3-Format** or **F4-Defaults** menu, highlight the desired field label, press **↵** to move to the desired *Type Style* column, then press **←** or **→** to select a type style. For example, to print the *Name* field in bold, highlight the *Name* field label, press **↵** to move to the *Bold Type Style* column, and then press **←** or **→** to turn the check mark on and off. To choose another type style, press **↵** and **←** or **→** when the highlight appears in the desired type style column. When a type style is selected, a check mark will appear in the field.




**Note:** You can have more than one style.

**Justification** The Justify column (to the right of the *Type Style* columns) lets you specify whether printed text will be left-justified, right-justified, or centered.

Choose "Field labels and format" from the F3-Format or the F4-Defaults menu, highlight the desired field label, press  to move to the Justify column, and then use the  and  keys to make your selection.

### **Data entry format**

The Type column lets you specify the format of information typed in a particular field. For example, you can specify that data entered in the C: Comments field must be numeric or an amount of money.

Choose "Field labels and format" from the F3-Format or F4-Defaults menu, highlight the desired field label, press  to move to the *Type* column, and then use the  and  keys to make your selection.

**Text** Only alphanumeric characters (numbers and alphabetic characters) can be entered in this field.





**Money** An amount of currency must be entered in this field. By default, Company Ladder will automatically add the dollar symbol (\$), but you can change this by choosing "Numeric symbol" from the F4-Defaults menu (see below).

If you choose the Money option, you may then t to the *Dec. Place* column and specify the location for a decimal place.

**Number** Only numeric characters may be entered in this field. To set a decimal place, t to the *Dec. Place* column and specify the location for the decimal.

### **Numeric symbol**

If you set up a field for numeric or money-type entry, you may wish to choose "Numeric symbol" from the F4-Defaults menu and change the default numeric symbols assigned to numeric/money fields. The preset defaults are:

**\$** The default currency symbol, which must be entered as the first character in the field. To use another currency symbol, type in the symbol or press  and type, on the numeric keypad, the integer value of the ASCII character you want to use. For example, to use the British £ symbol, you'd hold down the  key and type 156 on the numeric keypad. Other examples include the yen symbol ¥ ( 157) and the franc f ( 159).

*Position* toggles the position of the currency symbol before or after the number. Use the < and > keys to toggle this value.




- Comma—the thousands separator (e.g., 10,000). To change this symbol, follow the instructions for changing the default currency symbol.
- Period—the decimal symbol (e.g., 12.50). To change this symbol, follow the instructions for changing the default currency symbol.

## Box labels

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If you want to label a box (print text outside the box), choose “Box labels” from the **F3-Format** or **F4-Defaults** menu. The screen displays a list of possible locations and a column in which you can select a field (A through Z) that will print outside the box in that position. For example, the contents of field *B* can print above the upper left corner of the box, the contents of field *C* can print below the lower right corner of the box, and so on.




Let’s assume that you want each position’s salary information to print below the lower left corner of its respective box:

1. Set up this field (field *D* for example) to be a money field (see the previous section for details on how to do this).
2. Choose “Box labels” from the **F4-Defaults** menu.
3. Use the  and  keys to move the highlight to *Lower left*.
4. Press the  key until the field column displays *D*.
5. Press **F10** to accept your information and return to the Personnel Input window.

## Chart title

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A chart title can have up to six lines of text and print in bold, italics, or underline. The title prints at the top of the chart, centered across the page.

1. Choose “Chart titles” from the **F3-Format** menu.
2. Type the first line of title text and press , then  or  to select the desired type style(s) for this line.

3. Repeat step 2 for each additional line of title text, and press **F10** to complete the command.

**Note:** Company Ladder supports additional type styles for laser printers that support proportional fonts (HP DeskJet and DeskJet Plus, HP LaserJet and LaserJet 2, and 100% compatibles). See "Setting print options" in Chapter 6 for more information about type styles.





# Printing and previewing charts

Before you begin printing organization charts, you need to tell Company Ladder which printer you'll be using.

1. Choose "Select printer" from the **F5-Print** menu. You also need to choose the appropriate port (usually LPT1). If the name of your printer is not listed then you need to consult your printer manual. It should list the name of other printers that are similar to your's. Select the compatible printer name.\*
2. Using the **↑** and **↓** keys, highlight the desired printer name and press **F10**.
3. Select the port through which your computer talks to your printer and press **F10**. If in doubt, choose "LPT1."

## Printing a chart

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Once you've set up your printer, you can either set print options, specify a range to print, or press **Alt P** to print the entire chart using Company Ladder's preset print options.

Once printing begins, you can press **e** at any time to stop the printer. Company Ladder displays a message telling you to press **Esc** to cancel printing altogether or **F10** to resume printing your chart.

### Setting print options

Print options let you specify the layout for your chart—orientation (vertical or horizontal), margins, characters and lines per inch, type styles, and so on. Table 4 lists all Company Ladder print options, summarizes the function of each, displays the preset value of each in bold type, and lists alternate settings with parentheses.

*\* See page 46 for special notes regarding printer compatibility with Company Ladder.*

Table 4. Print options

<b>Orientation</b>	How the chart prints on the page: vertically (portrait orientation) or horizontally (landscape orientation).																	
Values:	<b>Portrait</b> (Landscape)																	
<b>Characters per inch</b>	The number of characters printed per horizontal inch.																	
Values:	<b>10 CPI</b> (12 CPI, 17 CPI, Proportional)																	
<b>Lines per inch</b>	The number of lines printed per vertical inch.																	
Values:	<b>6 LPI</b> (8 LPI)																	
<b>Shrink chart</b>	Determines whether Company Ladder prints the chart true to size or shrinks it horizontally, vertically, or both ways.																	
Values:	<b>No</b> (Horizontal, Vertical, Both)																	
<b>Equal width boxes</b>	Determines what positions have boxes of equal width.																	
Values:	<b>Peers</b> (Same rank, yes, no [yes = all])																	
<b>Equal height boxes</b>	Determines what positions have boxes of equal height.																	
Values:	<b>Peers</b> (Same rank, yes, no [yes = all])																	
<b>Number of copies</b>	Specifies the number of copies you wish to print.																	
Values:	<b>1</b> (to 1000)																	
<b>Page settings...</b>	Lets you specify page width, page height, margins, whether or not margins should appear on all pages, and the feed mechanism used by your printer.																	
Values:	<table><tr><td><b>Page width (inches)</b></td><td><b>8.00</b></td></tr><tr><td><b>Page height (inches)</b></td><td><b>11.00</b></td></tr><tr><td><b>Top margin (inches):</b></td><td><b>0.50</b></td></tr><tr><td><b>Bottom margin (inches):</b></td><td><b>0.50</b></td></tr><tr><td><b>Left margin (inches):</b></td><td><b>0.00</b></td></tr><tr><td><b>Right margin (inches):</b></td><td><b>0.00</b></td></tr><tr><td><b>Margin on all page?</b></td><td><b>No (Yes)</b></td></tr><tr><td><b>Feed mechanism:</b></td><td><b>Continuous</b> (Manual, Auto)</td></tr></table>		<b>Page width (inches)</b>	<b>8.00</b>	<b>Page height (inches)</b>	<b>11.00</b>	<b>Top margin (inches):</b>	<b>0.50</b>	<b>Bottom margin (inches):</b>	<b>0.50</b>	<b>Left margin (inches):</b>	<b>0.00</b>	<b>Right margin (inches):</b>	<b>0.00</b>	<b>Margin on all page?</b>	<b>No (Yes)</b>	<b>Feed mechanism:</b>	<b>Continuous</b> (Manual, Auto)
<b>Page width (inches)</b>	<b>8.00</b>																	
<b>Page height (inches)</b>	<b>11.00</b>																	
<b>Top margin (inches):</b>	<b>0.50</b>																	
<b>Bottom margin (inches):</b>	<b>0.50</b>																	
<b>Left margin (inches):</b>	<b>0.00</b>																	
<b>Right margin (inches):</b>	<b>0.00</b>																	
<b>Margin on all page?</b>	<b>No (Yes)</b>																	
<b>Feed mechanism:</b>	<b>Continuous</b> (Manual, Auto)																	
	To change the page width, height, and margin settings, type in the desired values.																	
<b>Type styles...</b>	*For printers that support 10 pt. and 14 pt. Times Roman and Helvetica, you define the chart titles and chart text type style.																	
Values:	<table><tr><td><b>Chart title:</b></td><td><b>Times Roman 10 pt.</b> (Times Roman 14 pt., Helvetica 10 pt., Helvetica 14 pt.)</td></tr><tr><td><b>Text:</b></td><td><b>Times Roman 10 pt.</b> (Times Roman 14pt., Helvetica 10 pt., Helvetica 14 pt.)</td></tr></table>		<b>Chart title:</b>	<b>Times Roman 10 pt.</b> (Times Roman 14 pt., Helvetica 10 pt., Helvetica 14 pt.)	<b>Text:</b>	<b>Times Roman 10 pt.</b> (Times Roman 14pt., Helvetica 10 pt., Helvetica 14 pt.)												
<b>Chart title:</b>	<b>Times Roman 10 pt.</b> (Times Roman 14 pt., Helvetica 10 pt., Helvetica 14 pt.)																	
<b>Text:</b>	<b>Times Roman 10 pt.</b> (Times Roman 14pt., Helvetica 10 pt., Helvetica 14 pt.)																	
<b>Set plotter pens...</b>	Lets you specify, by number, which pens should be used to print chart title, text, boxes, and lines.																	
Values:	Type in the desired pen number.																	

\* These printers use proportional spacing, so set Characters per inch to Proportional.

## To change an option:

1. Choose "Print options" from the **F5-Print** menu.
2. Highlight the option you wish to change and press  or  to view and select your choices. If the field requires data entry (such as the options available for page settings), type in the desired value.
3. Repeat step 2 for each print option you want to change.
4. Press **F10**. Company Ladder accepts the changes you've made and will remember these settings for all charts printed in the future (until you set new print options).

## Examples:

If your goal is to print a chart on a single page, you may want to override the preset print options with the options shown in the table below.

*Table 5. Settings for maximum content per page*

<b>Orientation:</b>	Landscape (unless you've set chart style to <i>Vertical</i> with the <b>F4-Defaults</b> menu, "Style/Chart style/Vertical" commands)
<b>Characters per inch:</b>	17 CPI (or Proportional, if your printer supports proportional fonts)
<b>Lines per inch:</b>	8 LPI
<b>Shrink chart:</b>	Both
<b>Equal width/height boxes:</b>	No
<b>Page settings:</b>	
Top & bottom margin:	0.00
<b>Type styles:</b>	(if supported by your printer)
Chart title:	Times Roman or Helvetica 10 pt.
Text:	Times Roman or Helvetica 10 pt.

If, on the other hand, you want to produce a chart on multiple pages and have each page represent a particular level, you might choose the options suggested in Table 6.

Table 6. Settings for level-oriented pages

<b>Orientation:</b>	Portrait
<b>Characters per inch:</b>	10 CPI (or Proportional, if your printer supports proportional fonts)
<b>Lines per inch:</b>	6 LPI
<b>Shrink chart:</b>	No
<b>Equal width/height boxes:</b>	Yes
<b>Page settings:</b>	
Top & bottom margin:	As desired
Left & right margin:	As desired
<b>Type styles:</b>	(if supported by your printer)
Chart title:	Times Roman or Helvetica 14 pt.
Text:	Times Roman or Helvetica 14 pt.

To ensure that Company Ladder prints one branch per page, it's essential that you choose "All branches at current rank" as the *Range to print* (as explained in the following section).

### Choosing a range

If you don't want to print the entire chart, you can specify the range to be printed before you press **AR** **P**. You can print from the top position, print the current branch only, or print all branches at the current rank, which will generate a separate chart for each branch.

1. Choose "Range to print" from the F5-Print menu. Company Ladder prompts you for the top of the range to be printed.
2. Choose the top of the range (starting point) and press **F10**.
3. Type the number of the lowest rank to be printed and press **F10**. For instance, Bottom rank: 10 prints positions up to and including those with a rank of 10.
4. Press **AR** **V** to preview and **F10** to step through the chart.
5. Press **AR** **P** to begin printing.

## Previewing your chart on-screen

Before you print your chart on paper, you may want to preview it on the screen, make any changes you wish, preview it again,

and then print your professional-looking chart on paper. To preview your chart as if it were actually printing on paper:

1. Press **Alt** **V** or choose "View chart" from the **F5-Print** menu. Company Ladder clears the screen and then displays your formatted chart.
2. Press **PgUp**, **PgDn**, **Home**, or any of the arrow keys to view various parts of your chart. The triangles in the screen border show where page breaks will occur on your printed chart.
3. When you've finished previewing your chart, press **F10** to return to the Personnel Input window.

**Note:** If you set a range (as explained in the previous section) prior to previewing your chart, Company Ladder will display the chart one branch at a time. To preview the next page, press **F10**.

## Printing to a file

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Once you have previewed your chart on the screen you may choose to save a copy of it on the disk for printing later. The following steps describe how to print to a file to the disk:

1. Press **F5-Print**.
2. Choose "Print to File" from the menu and enter a file name such as MY-CHART.PRN.
3. When it has finished printing your file to the disk, Company Ladder returns to the Personnel Input Window.

## Special notes about printers

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Because of the wide variety of printers and the way in which each printer works in printing information that it receives from the computer, the following section will help you with your printer setup.

### *LaserJet and DeskJet*

If you have a LaserJet or DeskJet printer select your printer as described in the beginning of this Chapter. Next select any cartridges or down-loadable fonts. For the best results it is recommended that you set the "F5-Print/Page settings/Feed mechanism" to Automatic and "Margins on all pages" to Yes.

### *Fonts and Cartridges*

If you selected a cartridge or down-loadable fonts you need to set "Print Options/Characters Per Inch" to Proportional. Then choose your type styles through "F5-Print/Print options/Type styles".

LaserJet cartridges and down-loadable fonts support only fonts listed on the cartridge. If the font you select is not listed the printer will automatically choose the font which closely resembles your choice. Your LaserJet knows which fonts to choose. For example, if you set "F4-Default/Field labels and formsts/Type style" to Bold and Italic, with most cartridges your LaserJet will print Bold. Most cartridges support Normal, Bold, and Italic fonts, but not a combination of Bold-Italic. Your LaserJet will choose and print Bold if you choose a Bold-Italic font style.

### *Fonts not supported*

LaserJet and DeskJet printers do not have a 12 CPI font built-in. You must use a 12 CPI font cartridge to print 12 CPI. However, this let you use other font types in your chart by selecting 12 CPI and using a cartridge with a type style not supported by the defaults or by the cartridges liste on the menu. If you have a 12 CPI cartridge you do not need to select "F5-Print/Characters Per Inch" to 12 CPI.

### *HP DeskJet*

Company Ladder does not support the Landscape cartridge of the HP DeskJet printer. The cartridge is not equipped to create graphic line drawings.

### *HP plotters*

An HP Plotter is a serial printer and should be connected to Communications Port on your PC. If this is your first time in connecting the plotter to your computer, it is recommended that you use the DOS MODE command and consult your HP Plotter manual to make sure the connection is made properly.

In the DOS MODE, the following commands are suggested:

**MODE = COM1: 9600,N,8,1,P**

Depending on the kind of computer system you have, the following commands may give you more consistent results:

**MODE = COM1: 9600,E,7,1,P**

These commands set up the computer with these parameters:

<b>COM1</b>	The plotter is connected to the COM1 port
<b>9600</b>	The speed (baud) at which the plotter communicates with the computer system
<b>N or E</b>	No parity or Even parity
<b>7 or 8</b>	Number of data bits
<b>1</b>	Number of stop bits

### *HP Color Pro Plotter*

This plotter has only a manual paper feed so you must set "F5-Print/Print options/Page settings/Feed mechanism" to Manual.

### *HP 7550a Plotter*

This plotter has only an automatic paper feed so you must set "F5-Print/Print options/Page settings/Feed mechanism" to Automatic.

### *Dot Matrix Printers/Landscape Mode*

Company Ladder does not support italic print when dot- matrix printers print in landscape mode.

### *QuietJet Printer*

The QuietJet printer does not support italic printing when configured to print in landscape mode.



# Performing calculations

Not only does Company Ladder chart the organization of your company and let you customize chart format, it also lets you create formulas and perform calculations on numeric field data. For example, Company Ladder can automatically calculate the number of hourly employees in your organization, determine the mean budget within a given rank, calculate the maximum and minimum sales quotas set for each division, and total individual salaries for positions within a particular branch.

Company Ladder makes it easy to create formulas and perform calculations on a field. You can type the formula directly, or choose from five different menu functions: Count, Sum, Mean, Maximum, and Minimum.

## Simple math

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To perform a basic calculation in a field, simply type in the formula. For example,  $100+22$ ,  $5*25$ ,  $990/2$ ,  $54-32$ , and so on. Be sure the field in which you enter your formula has been set up for numeric or money entry (see the "Field labels and their format" section in Chapter 5).

## Other functions

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Company Ladder also supports more detailed calculations, and lets you incorporate a value from one or more fields in your result. The hot key **Alt F** displays a list of functions from which to choose, lets you specify a range for the calculation, and then prompts for the field to be calculated.

For example, let's say that you set up field *D* to contain Salary information for each position. You now want field *E*—for the top position—to display the maximum salary for the top position's direct subordinates. The following steps show you how to do this.

1. Make the top position the current position, move to field E in the Personnel Input window, and press **Alt** **F**.
2. Choose "Maximum" and press **F10**.
3. Now choose "Subordinates" as the range you want to consider and press **F10**.
4. Type D as the field to be calculated and press **F10**. Field E now displays the formula @Max(Subordinates,D). For example,

A: Name:	Norma Young
B: Position:	President
C: Comments:	Exempt
D: Salary:	\$195,000
E: Max Salary	@Max(Subordinates, D)
F:	
G:	
<input type="button" value="↓"/>	

5. Move the highlight from field E to field F. You'll immediately see the result of the calculation rather than the formula used to calculate that information. For example, if the maximum salary among Norma Young's subordinates is \$152,000, the Personnel Input window would look like this:

A: Name:	Norma Young
B: Position:	President
C: Comments:	Exempt
D: Salary:	\$195,000
E: Max Salary:	\$152,000
F:	
G:	
<input type="button" value="↓"/>	

## Direct entry

If you prefer to bypass the **Alt** **F** method of entering formulas, you can use the information listed in Table 7 to directly enter formulas in the Personnel Input window. Table 7 lists and explains Company Ladder's mathematic functions and shows the actual formulas used to perform the calculations. The (*Range,field*) entry in each of these formulas represents a specified level of your chart (such as a particular position, rank, peers, direct subordinates, or everyone on the chart), and the field to be calculated (for example, C if you want to calculate numeric data in field C).

Table 7. Company  
Ladder functions

<b><u>Function</u></b>	<b><u>Description</u></b>
<b>Count</b>	Counts the number of positions at a specified level (e.g., in a particular rank, in the current branch, etc.).  Formula: @Count(Range)
<b>Sum</b>	Totals the values of a field for one or more positions (e.g., total of individual budgets within a specified branch).  Formula: @Sum(Range,x)
<b>Mean</b>	Calculates the mean of values entered in a given field for one or more positions (e.g., mean age of employees in a given rank).  Formula: @Mean(Range,x)
<b>Maximum</b>	Calculates the maximum value of data entered in a given field for one or more positions (e.g., highest commission structure in the company).  Formula: @Max(Range,x)
<b>Minimum</b>	Calculates the minimum value of data entered in a given field for one or more positions (e.g., minimum level of education among subordinates).  Formula: @Min(Range,x)*
*Ranges are TOP, MGR, PEERS, RANK, BRANCH, SUBS, ALLSUBS, and ALL.	



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