CLARIS™

FOR MACINTOSH

ClarisImpact™

GETTING STARTED

FOR MACINTOSH

ClarisImpact

Getting Started

Claris Corporation
5201 Patrick Henry Drive
Santa Clara, California 95052

LIMITED WARRANTY AND DISCLAIMER, LIMITATION OF REMEDIES AND DAMAGES YOU ACKNOWLEDGE THAT THE SOFTWARE MAY NOT SATISFY ALL YOUR REQUIREMENTS OR BE FREE FROM DEFECTS. CLARIS WARRANTS THE DISKETTES ON WHICH THE SOFTWARE IS RECORDED TO BE FREE FROM DEFECTS IN MATERIALS AND WORKMANSHIP UNDER NORMAL USE FOR 90 DAYS FROM PURCHASE, BUT THE SOFTWARE AND ACCOMPANYING WRITTEN MATERIALS ARE LICENSED "AS IS." ALL IMPLIED WARRANTIES AND CONDITIONS (INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE) ARE DISCLAIMED AS TO THE SOFTWARE AND ACCOMPANYING WRITTEN MATERIALS AND LIMITED TO 90 DAYS AS TO THE DISKETTES. YOUR EXCLUSIVE REMEDY FOR BREACH OF WARRANTY WILL BE THE REPLACEMENT OF THE DISKETTES OR REFUND OF THE PURCHASE PRICE. IN NO EVENT WILL CLARIS OR ITS DEVELOPERS, DIRECTORS, OFFICERS, EMPLOYEES OR AFFILIATES BE LIABLE TO YOU FOR ANY CONSEQUENTIAL, INCIDENTAL OR INDIRECT DAMAGES (INCLUDING DAMAGES FOR LOSS OF BUSINESS PROFITS, BUSINESS INTERRUPTION, LOSS OF BUSINESS INFORMATION, AND THE LIKE), WHETHER FORESEEABLE OR UNFORESEEABLE, ARISING OUT OF THE USE OF OR INABILITY TO USE THE SOFTWARE OR ACCOMPANYING WRITTEN MATERIALS, REGARDLESS OF THE BASIS OF THE CLAIM AND EVEN IF CLARIS OR AN AUTHORIZED CLARIS REPRESENTATIVE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

Claris' liability to you for actual damages for any cause whatsoever, and regardless of the form of the action, will be limited to the greater of $500 or the money paid for the Software that caused the damages.

THE ABOVE LIMITATIONS WILL NOT APPLY IN CASE OF PERSONAL INJURY ONLY WHERE AND TO THE EXTENT THAT APPLICABLE LAW REQUIRES SUCH LIABILITY. BECAUSE SOME JURISDICTIONS DO NOT ALLOW THE EXCLUSION OR LIMITATION OF IMPLIED WARRANTIES OR LIABILITY FOR CONSEQUENTIAL OR INCIDENTAL DAMAGES, THE ABOVE LIMITATIONS MAY NOT APPLY TO YOU.

Contents

Welcome to ClarisImpact

ClarisImpact application icon

ClarisImpact is a smart, integrated business graphics program that allows you to create, edit, and communicate attractive, professional-looking business graphics quickly and easily.

ClarisImpact documents share functions and features with other Claris™ products. If you've used the ClarisWorks™, MacDraw™, or MacWrite™ applications, you'll find many similarities.

Using this book

Chapter 1, "Installing ClarisImpact," provides instructions on installing the ClarisImpact application and supplemental files on your hard disk.

Chapters 2 through 6 are tutorial sessions that allow you to try out ClarisImpact by following hands-on, step-by-step exercises. The tutorial is designed so that you can complete it all at once or a chapter at a time.

Steps that you must follow to complete the tutorial are numbered, like this:

1. **Perform instructions that appear as boldfaced steps.**

   Explanatory information may follow the step (indented and in type like this). Although explanations may sometimes tell you of alternative actions that you can take, you should perform only those actions that appear in bold type if you want your work to match the examples in the text.

Special information is presented in the following ways:

- **Note** messages give extra information about a procedure.
- **Tip** messages provide helpful information or describe a different way to do something.
- **Important** messages warn you when you cannot undo an action.

Text that you should enter from your keyboard appears like this:

```
This is text you enter from the keyboard.
```

Your onscreen view of the tutorial documents depends on the size of your screen and whether your monitor is color or black and white. If you don't have a color monitor, the tutorial documents appear in black, white, and shades of gray. You can do everything in the tutorial using any standard Macintosh monitor. Also, you can adjust the size of the ClarisImpact window to match the screen size shown in the illustrations, if you wish.

The documents also display fonts and font sizes that are available only if you performed a full installation of ClarisImpact. If you didn't, and want access to these fonts, refer to "Doing a custom installation" on page 1-9 for help.

Onscreen Help

ClarisImpact Help provides onscreen, step-by-step instructions and reference information as you work in ClarisImpact. You can easily search for topics and move from one topic to another in the Help system.

If you are running Apple System 7 or greater, you can also use ClarisImpact Balloon Help. Balloons provide brief descriptions of ClarisImpact tools, as well as information about system icons and menus.

For more information about the Help system and how to use it, see chapter 1, "ClarisImpact overview," in the *User's Guide*.

Chapter 1

Installing ClarisImpact

Chapter 1

Installing ClarisImpact

This chapter provides step-by-step instructions for installing the ClarisImpact application and associated files on your Macintosh, and starting ClarisImpact. It also describes how to adjust the memory for ClarisImpact if you need to.

◆ **Important** These instructions assume that you're familiar with standard mouse techniques such as clicking and dragging. If you find you need more information about mouse techniques, working with disks, or making copies of documents and disks, see the documentation that came with your Macintosh.

What you need

To install and use ClarisImpact, you need the disks in the ClarisImpact package and the following equipment and software:

- a Macintosh Plus or any later Macintosh model
- an internal or external hard disk
- one 1.4 MB SuperDrive floppy disk drive

- Macintosh system software version 6.0.7 or later. If you have System 7, you can take advantage of Balloon Help, a supplement to ClarisImpact Help.
- at least 2 MB of memory if you have System 6
- at least 4 MB of memory if you have any version of System 7. If you are using System 7.0 or System 7.0.1, you also must have System 7 tune-up, version 1.1.1, installed. System 7 tune-up is available from Apple Computer, Inc. or your Apple dealer.

Before you begin

Before you begin the installation process, make backup copies, turn off virus protection, and register your new software.

Make backup copies

To protect your software, lock your ClarisImpact disks by sliding the locking tab on each disk so that the hole in the disk is open. Then make backup copies of the disks before you start the installation procedure. If you need information on locking and copying disks, see the documentation that came with your Macintosh.

After you've made backup copies, store the original disks in a safe place. Lock the copies and use them for installation and everyday work.

◆ **Important** Give each backup disk the same name as the disk you're backing up, for example, *Disk 1*. ClarisImpact won't recognize a disk if its name is different from the original.

Turn off virus protection

Some virus protection programs may conflict with the ClarisImpact Installer. Before you install ClarisImpact, turn off any virus protection programs. Refer to the documentation that came with your virus protection software for more information.

Register with Claris

The registration card is part of the ClarisImpact package. Take a minute now to complete and send in the Claris Registration Card.

As a registered ClarisImpact owner, you're eligible for special benefits:

- technical support
- software updates
- special prices on upgrades
- Claris product news
- announcements of special promotions of Claris products

To register your software, complete and mail the owner registration card that comes with ClarisImpact. Keep the part of the card with your serial number on it in a safe place.

Installing ClarisImpact

You have two options for installing ClarisImpact on your hard disk:

- Easy (complete) installation is the recommended method. The Installer installs the entire ClarisImpact package and puts all files and folders in their preferred locations.
- Custom installation lets you choose the files to install.

Where everything goes

The following table shows what you can install and the best location for each file or folder on your hard disk.

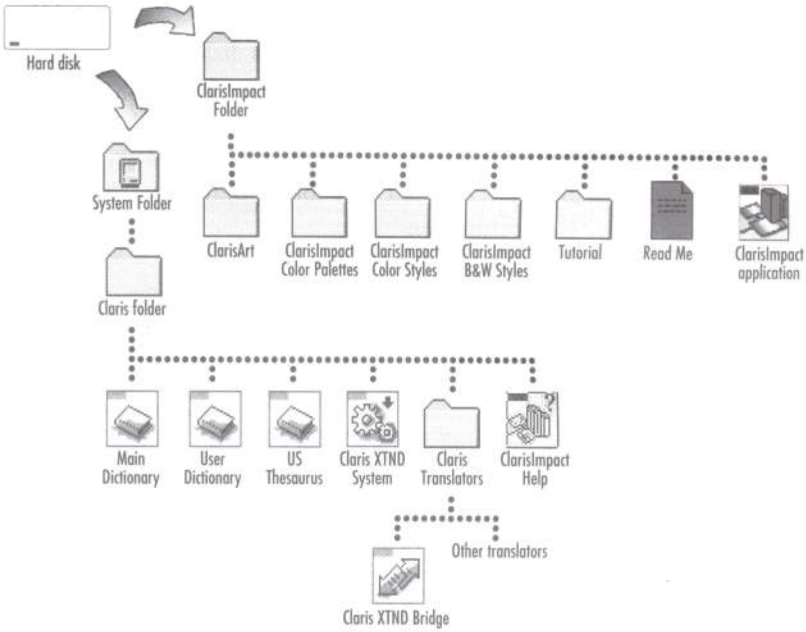
Regardless of the installation option you choose, or which files and folders you install, ClarisImpact knows where to look for needed files.

On a System hard disk

When you install on a system hard disk—a disk with a System Folder—ClarisImpact creates the ClarisImpact Folder for the application and other files. It also creates a Claris folder in the System folder. If you already have a Claris folder and you are installing onto a system disk, the Installer updates any existing files in your Claris folder. Before updating any files, the Installer asks for your permission.

Location on hard disk	Name of file or folder	Description
ClarisImpact Folder	ClarisImpact	The ClarisImpact application
	Read Me	Text file with important, last-minute information. To see the file's contents, double-click its icon.
	Tutorial folder	Sample files that help you work through the exercises in *ClarisImpact Getting Started*
	ClarisImpact B&W Styles folder	Files with preset black and white styles for each ClarisImpact model.
	ClarisImpact Color Styles folder	Files with preset color styles for each ClarisImpact model.
	ClarisImpact Color Palettes folder	Files containing color palettes that can be opened with the Color panel of the Preferences dialog box
	ClarisArt folder	Files with over 3,000 pieces of art. Also includes a ReadMe file with installation options for art.
Claris folder in your System Folder	ClarisImpact Help	Software for opening and using ClarisImpact Help
	Claris Translators folder	Filters used by ClarisImpact to read files from other applications. Includes Claris XTND bridge.
	Claris XTND System	Software that lets you open and save documents in other formats
	Thesaurus	A thesaurus with approximately 220,000 words
	User Dictionary	Your customized list of spelling exceptions and additions to the Main Dictionary. The Installer doesn't install a User Dictionary if you already have one in your System Folder.
	Main Dictionary	A dictionary with approximately 100,000 words that ClarisImpact uses to spell check your files

The installer places the files in the ClarisImpact Folder and the Claris folder inside your System folder



The illustration shows where ClarisImpact puts the files. ClarisImpact also installs the following font information, depending on your system.

System level	Description	Name of file or folder on hard disk	Location on hard disk
System 6	Startup document with font information	TrueType	System Folder
System 6 and System 7.0.1	Font files	Fonts	System file in your System Folder
System 7.1	Font files	Fonts	Fonts folder in your System Folder

◆ **Note** Some of the ClarisImpact files you install are utility files that are used by the application. These files cannot be opened by double-clicking. For example, if you double-click the Main Dictionary file, you see an error message to let you know that you can't open the dictionary this way. (For information about opening files, see the *ClarisImpact User's Guide*.)

On a non-System hard disk

If you install onto a hard disk that does not have a System Folder, the Installer puts the Claris folder and its contents into the ClarisImpact Folder.

Doing an easy installation

Follow these steps to install the complete ClarisImpact package. If you have used other Claris products, the procedure will be familiar.

To install ClarisImpact:

Disk 1

Installer

1. **Insert Disk 1 into the 3.5-inch disk drive.**

   You see the Disk 1 window on the screen. If you see only the Disk 1 icon, double-click the icon to open the window.

2. **Double-click the Installer icon.**

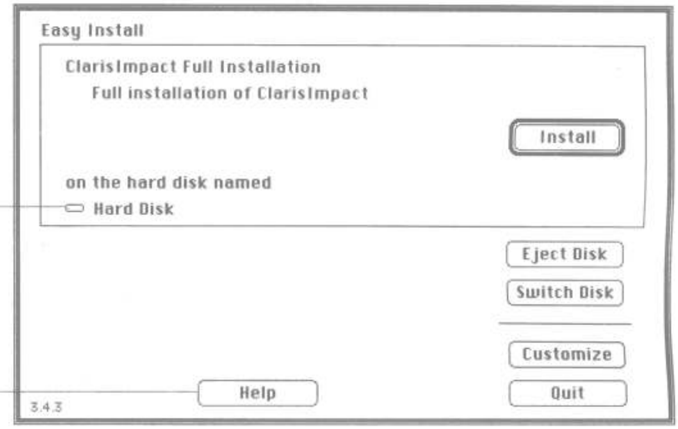
   In a moment, you see the ClarisImpact Installer welcome screen.

3. **Click OK.**

You see the Easy Install dialog box.

Disk where ClarisImpact will be installed

Click to read additional instructions



4. **If you don't see the name of the hard disk where you want to install ClarisImpact, click Switch Disk.**

   If you switch to a floppy disk or a disk that doesn't have enough space available, the dialog box tells you why you can't install onto that disk.

5. **Click Install.**

   The Installer begins copying files. Some ClarisImpact files are compressed to fit on the floppy disks, and the Installer expands these files as each one is installed. A dialog box tells you what the Installer is doing.

6. **Insert the other disks as you are asked for them. Click Cancel if you want to cancel the installation process.**

   After all the files are installed, a final dialog box tells you that the installation was successful.

7. **Click Restart.**

   If you look on the hard disk, you see the ClarisImpact Folder, which contains the application. If you turned off virus pretection before installing, you can turn it on now.

Doing a custom installation

If you are familiar with the Macintosh and ClarisImpact, you may want to install a subset of the ClarisImpact files to conserve space or to avoid installing translators, art files, or other files that you may not need. A custom installation is particularly useful if you have limited space available on your Macintosh.

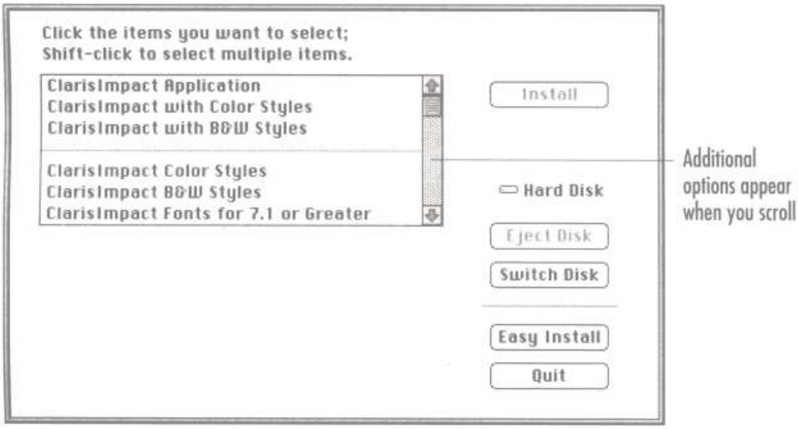
You have several options for custom installation. You can choose to install any combination of files.

You can do a custom installation only to a system disk (a disk containing a System Folder).

To install a subset of the ClarisImpact files:

1. **Follow steps 1 through 4 in "Doing an easy installation" on page 1-7.**
2. **Click Customize.**

   The dialog box lists the files you can install.

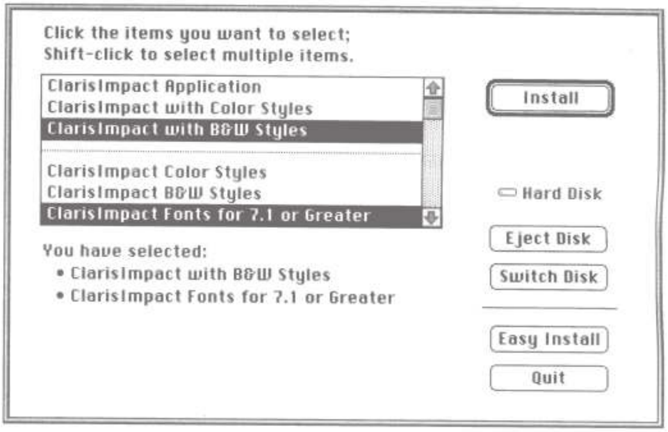


3. **Click the items you want to install.**

   When you select a single item, ClarisImpact provides information about it.

   To select multiple items, hold down the Shift key as you click.

As you select each item, the Installer adds it to a list in the lower-left corner of the dialog box, as shown in this example.



4. Click **Install.**

   The Installer begins copying files. Some ClarisImpact files are compressed to fit on the floppy disks, and the Installer expands these files as each one is installed. A dialog box on the screen tells you what the Installer is doing.

   You see an alert box if the current disk doesn't have enough space for the files you select.

5. Insert the other disks as you are asked for them. Click **Cancel** if you want to cancel the installation process.

   After the files are installed, a final dialog box tells you that the installation was successful.

6. Click **Quit** to exit the Installer, or **Continue** to do additional installations. (In some cases, the Installer requires you to restart.)

   If you look on the hard disk, you see the ClarisImpact Folder, which contains the application. If you turned off virus pretection before installing, you can turn it on now.

Starting ClarisImpact

You can start ClarisImpact from the desktop and create a new file, or you can open an existing file.

To start ClarisImpact:


ClarisImpact Folder


ClarisImpact

1. **Double-click the ClarisImpact Folder icon (on the desktop) to display its contents.**
2. **Double-click the ClarisImpact application icon.**

   The first time you start the application, ClarisImpact asks you to personalize your copy. See "Personalizing your software," next, if you need help.

   When you double-click the application icon, you see the New Document dialog box. To create a file, click a document type and then click **OK**. To open an existing file, click **Open** in the New Document dialog box and then choose a document from the Open dialog box. For more information about creating and opening files, see the *ClarisImpact User's Guide*.

Personalizing your software

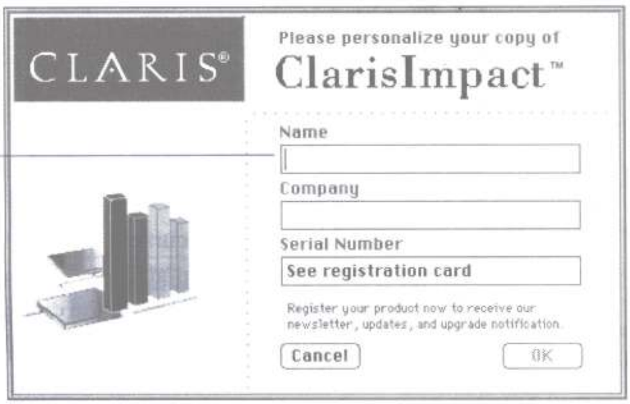
The first time you use ClarisImpact, enter your name, company name if applicable, and software registration number in the Personalize dialog box. You need to do this only when you install ClarisImpact.

To personalize your software:

1. **Start ClarisImpact by double-clicking the application icon.**

   You see the Personalize dialog box.

A blinking insertion point shows that you can type information



2. **Type your name in the Name box and press Tab.**

   The insertion point moves to **Company**.

3. **Type your company name and press Tab.**

   If you don't have a company name, type your address or other information, or leave the box blank.

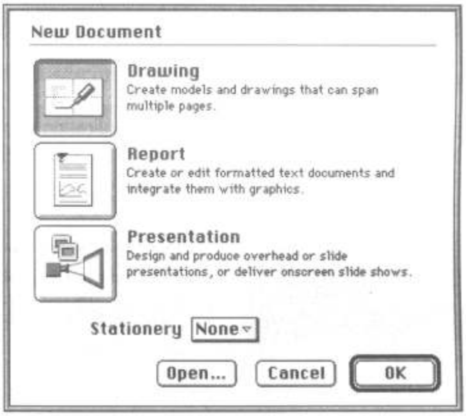
4. **Type the serial number from your ClarisImpact registration card.**

   The serial number is optional, but Claris recommends entering it here in case you lose your registration card. You need the serial number if you call Claris Technical or Customer Support.

◆ **Important** Check your typing carefully. If you find a mistake, press Tab to move through the boxes and correct the error or type the information again. You can't change the name, company, or serial number after you leave this dialog box unless you reinstall ClarisImpact.

5. **Click OK.**

   You see a start-up screen briefly, and then you see the New Document dialog box.



Now, you can either create a document or close the dialog box. To create a document, press the down- or up-arrow to choose a document type, and then press the Return or Enter key. To close the dialog box, click **Cancel**. For more information on creating and working with ClarisImpact documents, see the *ClarisImpact User's Guide*.

Adjusting memory

The Macintosh sets aside a certain amount of memory for each application. When you start ClarisImpact, it tells the Macintosh how much memory to allocate. If you're using System 7, or MultiFinder with System 6.0.7 (or higher), you can change the amount of memory reserved for ClarisImpact.

You can increase the size of the application if you plan to work on an especially large document, use many graphics, have a large monitor, or work on multiple files. Or, you can reduce the memory for ClarisImpact if you're running multiple applications at the same time. In general, though, avoid specifying less memory than the suggested size in the ClarisImpact Info dialog box.

For more information on managing Macintosh memory, refer to the documentation that came with your Macintosh.

To change the amount of memory ClarisImpact uses:

1. **If ClarisImpact is open, choose Quit from the File menu to quit the application.**
2. **Open the ClarisImpact Folder and click the ClarisImpact application icon once.**

   If you click the application icon twice, you start ClarisImpact. If that happens, choose **Quit** from the File menu and try again.
3. **Choose Get Info from the File menu.**

   You see the ClarisImpact Info window.

Memory used by ClarisImpact

4. Double-click **Preferred size.**

   You see the size highlighted in the box.

- **Note** Your ClarisImpact Info box may look different—it varies depending on the system you are using. You may need to click **Application size** or **Current size**.

5. Type a number to change the memory size.
6. Close the information window.

   The next time you start ClarisImpact, the amount of memory you specified is available for the application.

Chapter 2

Taking a first look at ClarisImpact

Chapter 2

Taking a first look at ClarisImpact

Learning ClarisImpact is easy! This tutorial introduces you to some of the significant concepts and features of ClarisImpact and gives you some hands-on experience. If you like to learn by doing, these chapters are for you.

This session orients you to basic concepts and introduces you to ClarisImpact *models*—intelligent business graphics that are easy to create and edit and provide you with professional-looking results.

You learn how to:

- start ClarisImpact and open an existing document
- create and manipulate models, drawings, and text frames
- apply a predesigned *model style* to an existing model
- decide what kind of ClarisImpact document best suits your needs
- create new documents of different types

Opening your first ClarisImpact document

Begin the tutorial by starting the application and opening a sample document supplied in the Tutorial folder.

- **Note** To work through this tutorial, you need to have installed the tutorial files on your hard disk. If you performed an easy installation following the instructions in chapter 1, "Installing ClarisImpact," these files are located in the Tutorial folder within the ClarisImpact Folder. If you can't find the tutorial files, see "Doing a custom installation" on page 1-9.

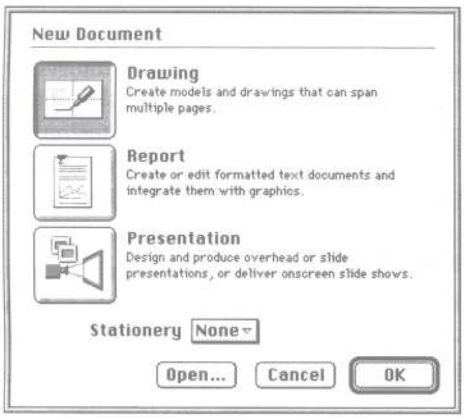
Starting ClarisImpact

ClarisImpact application icon

Start ClarisImpact by double-clicking the ClarisImpact application icon.

- **Note** If this is the first time you have started ClarisImpact, you see the Personalize dialog box. Refer to "Personalizing your software" on page 1-11 for more information.

ClarisImpact displays the New Document dialog box. You'll learn more about this dialog box later. Notice, though, that there are three kinds of document types that you can work with.



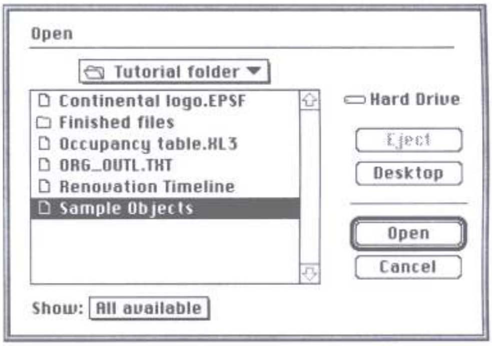
Opening the first tutorial document

The tutorial document you will work with in this session is called Sample Objects.

To open Sample Objects:

1. **Click Open in the New Document dialog box.**

   You see the Open dialog box.



2. **Navigate to the Tutorial folder and select Sample Objects.**

   The Tutorial folder is located within the ClarisImpact Folder on your hard disk. For help with navigating between folders, refer to the documentation that came with your Macintosh.

3. **Click Open (or double-click the name).**

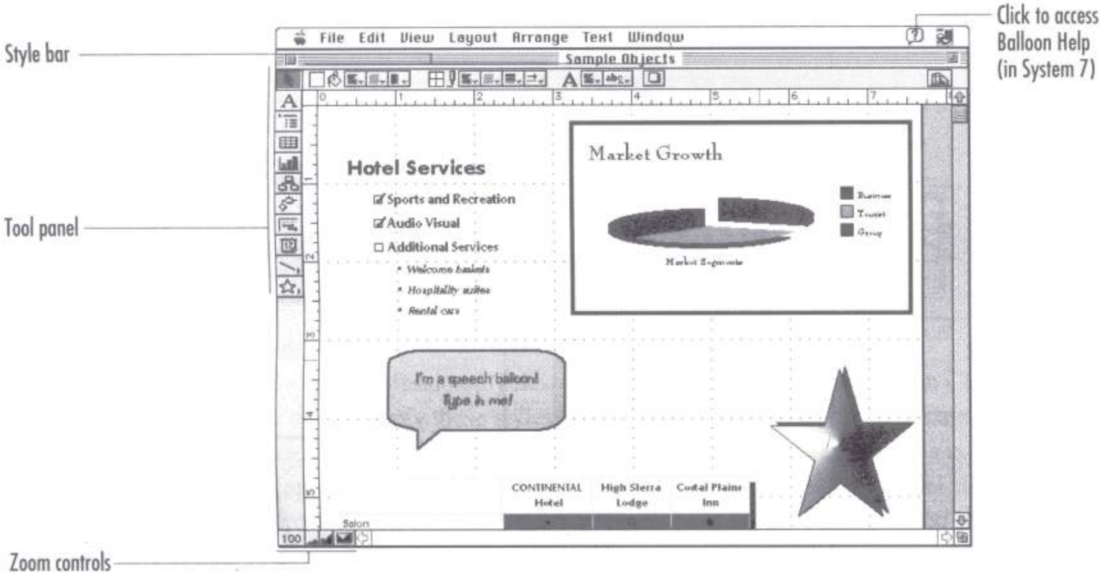
   Sample Objects, a ClarisImpact document, opens on your screen.

About the document Sample Objects

In the ClarisImpact application, you can create and work with three types of documents—drawings, reports, and presentations. You can use the program's charting, drawing, and text creation features in each document type.

Sample Objects is a ClarisImpact *drawing* document. You'll learn more about the three types of ClarisImpact documents in the section "Understanding document types" on page 2-21.

Take a moment to familiarize yourself with the document window you see on your screen. It should look similar to this (depending on your system configuration). Notice the graphics grid and graphics rulers at the top and left side of the document window. They help you place objects precisely in your drawing.



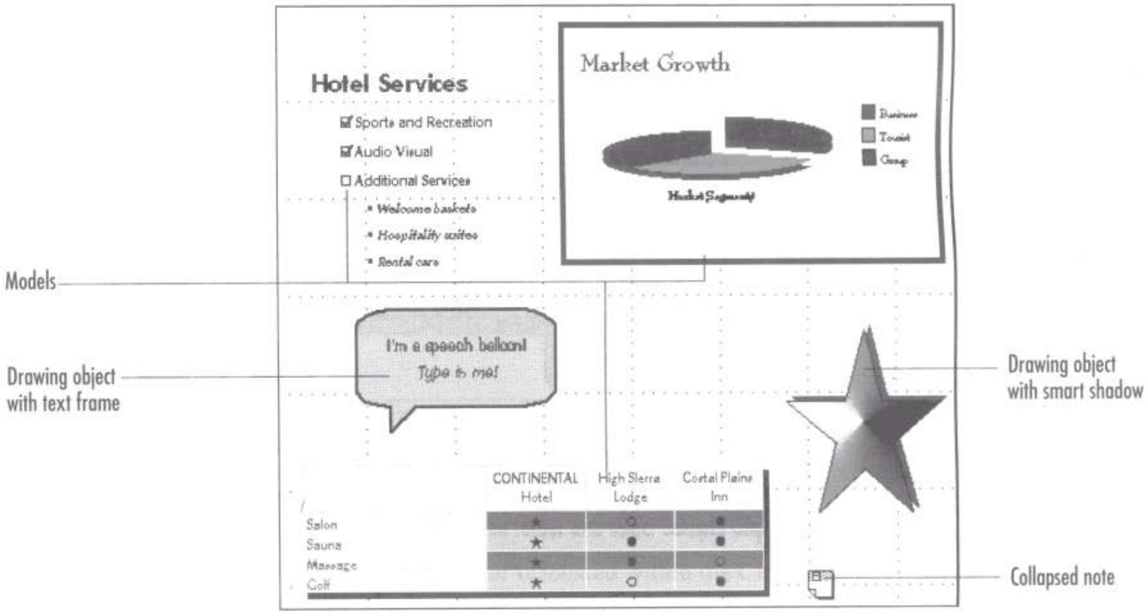
On the left side of your screen you see the ClarisImpact tool panel, which contains tools you use to add models, drawings, and text frames to your document. Across the top of the window is the style bar with controls for changing the appearance of objects and text. Finally, notice the zoom controls in the bottom-left corner. You use these controls to magnify or reduce your view of the working area. The tool panel, style bar, and zoom controls are all covered in more detail later in the tutorial.

◆ **Note** You should be familiar with Macintosh conventions, such as how to use menus and scroll bars. If you're not, refer to the documentation that came with your Macintosh.

If you are using System 7 software or later and want to see a brief description of a tool or menu title, use Balloon Help. Choose **Show Balloons** from the Help menu (the question mark in a balloon in the upper-right corner of the screen).

Understanding ClarisImpact objects

The sample document contains different kinds of ClarisImpact *objects*: models, drawing objects, and text frames. Notice the variety of objects in the view of Sample Objects, below. All were created quickly and easily with ClarisImpact.

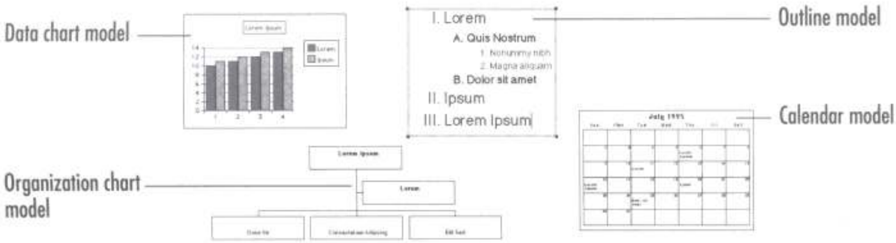


◆ **Note** You may need to scroll or expand your window to see all of the document.

Models and model styles

A *model* is an intelligent graphic that expresses business data. As you update the data, the model automatically changes to reflect the new information. You create models, such as outlines, tables, data charts, organization charts, flow charts, timelines, or calendars, with the tools on the model tool panel.

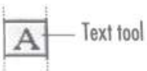
Model tool panel

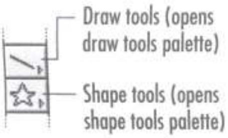


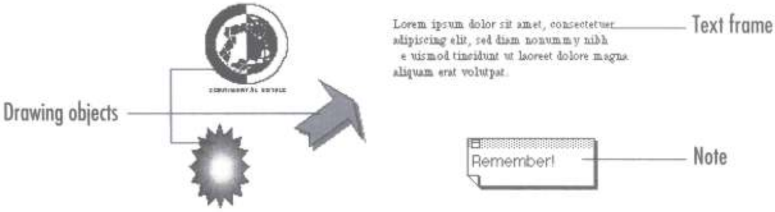
Several professionally designed *model styles* are included with ClarisImpact. You can apply these styles as you work with a model to automate formatting and layout. To help you create different types of models with a consistent appearance, ClarisImpact comes with several predefined model styles that are grouped into *families*. The settings in each family were selected by a designer to convey a coherent and professional image.

Drawing objects and text frames

Drawing objects are created with the built-in draw and shape tools—lines, curves, geometric shapes, and other more complex images. Use the text tool to create text frames to type into, and the note tool (found on the draw tool palette) to create electronic notes for reminders or comments.







You'll learn more about models and other objects as you work through the tutorial. For now, you may find it helpful to practice a few basic maneuvers.

- **Note** Don't worry about making mistakes while you work through the following procedures. Experiment if you like! You won't need to save the Sample Objects file; it's provided to give you a chance to practice. Also, remember that you can usually cancel an action as long as you haven't done something else before changing your mind. Just choose **Undo** from the Edit menu. The **Undo** command changes to **Redo** after you choose it, so you can restore a change if you wish. Finally, you can always return to the last saved version of your document by choosing **Revert** from the File menu.

Working with models and objects

You must select an object before you can do anything with it—for example, moving it, changing its size, or applying a style. The way you select and work with a draw object is slightly different from the way you interact with a model or text frame.

Working with a draw object

Find the 5-point star in the Sample Objects document (using the scroll bars if necessary). It is on the right side about halfway down. (This *smart shape* was created in one step using the star tool on the shape tools palette.)

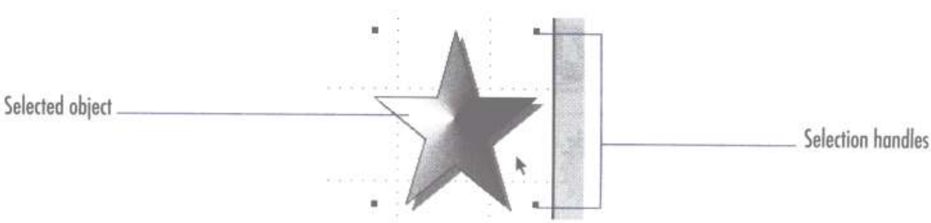
Selecting a draw object is straightforward:

Selection arrow

1. **If necessary, click the selection arrow (on the tool panel).**

   The selection arrow must be selected before you can select an object.

2. **Click the star.**



The star now has *handles*—black squares at the corners of the object's boundary. Handles indicate that an object is selected.

You also use the selection arrow to move an object and to change its size:

1. **Position the selection arrow over the star.**
2. **Hold down the mouse button and drag the object to a different place.**

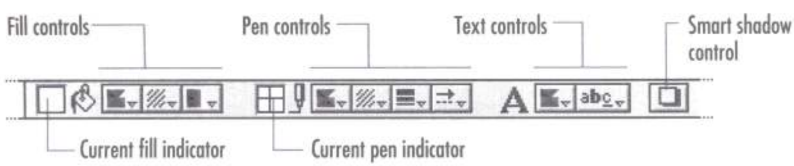
   Don't drag a handle or you'll resize the object.
3. **Now, resize the star by dragging one of its selection handles.**

   To resize proportionally, press Shift as you drag. Press Option as you drag a handle to resize from the center of the object.

   The star changes size as you drag.

Using the style bar

Use the controls in the style bar (at the top of the document window) to apply *styles* to objects. There you find the fill controls (color, pattern, gradient), the pen controls (color, pattern, size, arrow/dash), and the text controls (color, style). A pop-up palette appears when you click any of these controls. An object must be selected to change its fill or line style.



Let's focus on another draw object now—the speech balloon. This object, located to the left of the star, is another example of a smart shape drawn using a tool from the shape tools palette.

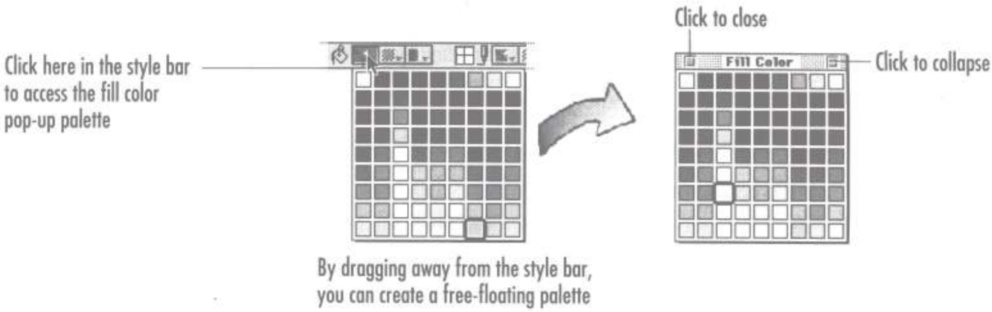
To change the fill color of the speech balloon:

1. **Select the speech balloon with the selection arrow.**

   You see selection handles at each corner of the object.

   If you clicked in the center of the balloon, you notice that there is a separate text frame within the balloon. For now, you want to work only with the balloon, so click the outline of the balloon.

2. **Click the fill color control in the style bar and select a light yellow hue from the pop-up palette.**



(If your Macintosh does not display at least 256 colors, your fill color palette will look different. Select a yellow color if possible.)

You see the new color reflected in the speech balloon.

◆ **Tip** You can "tear off" the fill color pop-up palette (or any of the palettes in ClarisImpact) by pressing on the control that activates the palette (the fill color control, in this case) and dragging into the document window until you see a dotted outline of the palette. When you release the mouse button, the free-floating palette appears. Close it or collapse it by clicking the appropriate box.

Investigating smart alignment

As you may have noticed earlier, the speech balloon contains two objects: a draw object and a text frame. These two objects are invisibly linked using one of the *smart* tools in ClarisImpact—the SmartAlign™ tool. Using smart alignment allows you to link multiple objects and create certain relationships among them.

To see how the SmartAlign tool was used:

1. **Select the text frame within the speech balloon.**

   Click only once. Clicking twice *activates* the frame and readies it for text entry (which is not what you want). If this happens, press Enter. You see the selection handles at the corners of the text frame.

2. **Try to drag the text frame outside the balloon.**

   Notice how the text frame remains in exact alignment inside the balloon—no matter where you drag it. The two are linked using the SmartAlign horizontally centered and vertically centered options.

3. **Drag a selection rectangle with the pointer arrow around the speech balloon to select both objects.**

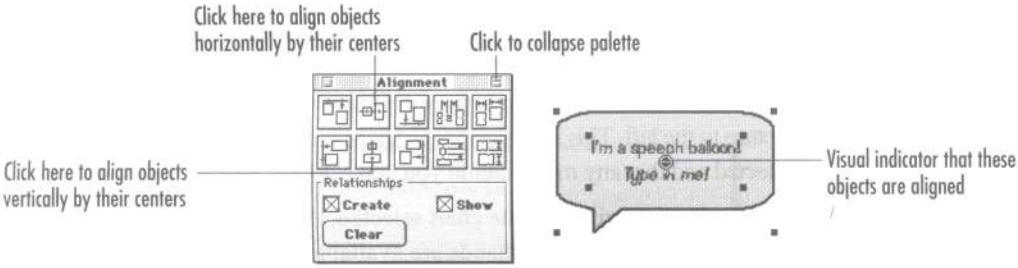
   Be careful not to drag another object by mistake. If you do, choose **Undo Move** from the Edit menu (or press Command-Z).

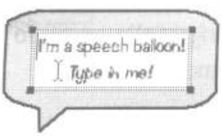
4. **Choose Alignment from the Arrange menu.**

   You see the Alignment palette.

5. **Click the checkbox to Show the alignment relationships.**

   A small circle appears in the center of the two objects to indicate that the two centered options are active. (You may need to click once on the center of the text frame.)





6. **Now, click a second time on the text frame to edit it.**

   You see a double-dotted border around the frame. The frame activates (or turns white) and a blinking text insertion point appears where you clicked. The selection arrow becomes an I-beam pointer.

   If the Alignment palette is in your way, collapse it using the box in the upper-right corner.

7. **Press Command-A to select all the text and then type your name, or any other text, into the frame.**

   Whatever you type replaces the highlighted text.

8. **Click outside the balloon in a blank area of the document.**

9. **If you want, experiment with the other icons in the Alignment palette.**

   Be aware that some of these options require three different objects to work properly. (For more details, see chapter 12, "Working with objects" in the *User's Guide*.)

10. **Close the Alignment palette when you have finished.**

Working with models

ClarisImpact models are objects made up of other objects—or model *elements*—that are intelligently linked. A model is enclosed by a rectangular border or *frame*. When you select the model frame, you can move, resize, or otherwise manipulate a model as if it were a single object.

Examine the Sample Objects document. There are three models: an outline in the upper left, a data chart in the upper right, and a table in the lower middle.

Let's move the data (pie) chart, entitled "Market Growth" down a little:

1. **With the selection arrow, click once anywhere on the model or frame.**

   You see selections handles just like the ones you saw when you selected the draw objects in the previous section.

   Model selection arrow

   When the selection arrow is over a model frame that is selected, it looks like the picture to the left. This selection arrow shape indicates that the whole model is selected and that any modification you make affects the model as a whole.

   Notice also that with the data chart selected, the Chart menu appears in the menu bar. Not all the commands are available yet because you haven't selected an element within the model frame.

2. **Make sure that Autogrid (on the Layout menu) is active.**

   It should have a checkmark by it. If it doesn't, choose it. Use Autogrid to move and resize objects only in preset increments. Autogrid allows you to move objects precisely and helps you keep objects aligned.

3. **Drag the model down 1/4-inch.**

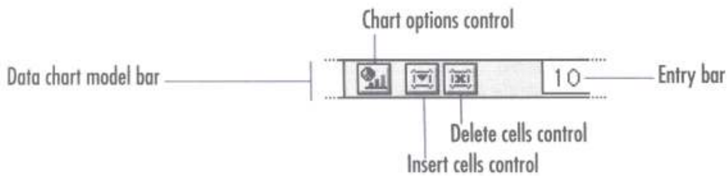
   Use the graphics grid and rulers to help you.

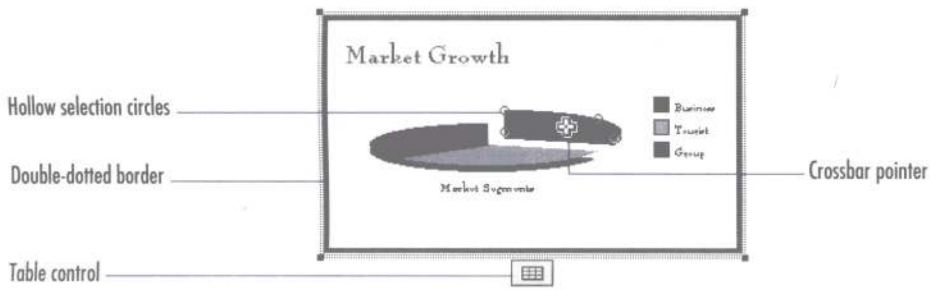
When you click a model twice, you can change the individual elements inside the model frame. The bars in a bar chart, the days in a calendar, or the boxes in an organization chart are all examples of elements. You can select most elements and change their data, color, pattern, font, position, or other settings. You cannot move elements outside the model frame.

Try editing a chart element:

1. **The chart should still be selected. Click a second time directly on the upper-right piece of the pie (which is "exploded").**

   Now you see a double-dotted border around the model. The selection arrow becomes a crossbar and you see hollow selection circles around the selected pie slice. The model is now in an *active* state. As long as the model is active, you can select any element within the model by clicking it once.





   A model bar appears along the top of the document window under the style bar with special controls for working with the model, as well as a box for entering data.

   You also see the table control at the bottom of the model frame. You can display the data table that the chart is based on by clicking this control.

2. **Click the table control to display the data table.**

   You see the data table appear under the chart.

   Often, you don't need to display the data table to edit your chart because of ClarisImpact's ability to perform in-chart editing. Because the Business segment pie slice is selected, its value appears in the entry bar ready for editing.

3. **Type `25`, replacing the 10 that was there, and then press Enter.**

   You don't need to click in the entry box; whatever you type automatically replaces the value there.

   The chart redraws to reflect the new value. Notice that the value updates in the data table as well.

4. **Click the table control again to hide the data table.**

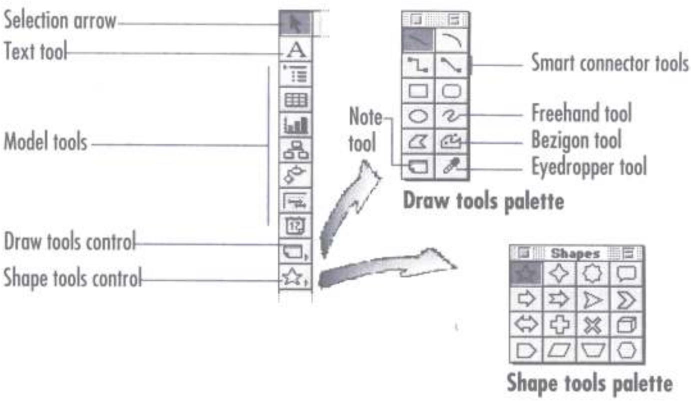
You can edit any of the chart elements in this way: just click the element that needs to be changed (including the chart title or labels) and type a new value in the entry box.

Deactivating a model

If you need to move a model or change the model frame after you've selected an element, click once outside the model or press Enter to deactivate it. At that point, only the model frame will be selected, and you can make any modifications that you wish to the frame as a whole.

Creating draw objects

The models and other objects you see in the sample document were all created using the tools in the ClarisImpact tool panel.



You form all models and objects in the same general way: first click the appropriate tool, and then drag (or click) in the document window to form the object.

Drawing an object

You can use the draw and shape tools in any of the three ClarisImpact document types—drawings, reports, or presentations. Near the bottom of the tool panel, you can see the controls for the draw tools palette and the shape tools palette. To select a tool from these palettes, click the control and drag the pointer to choose the tool from the palette.

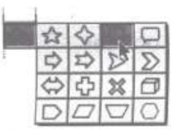
The draw tools are used to create simple lines and shapes. You also have access to the smart connector tools here. Use a smart connector to connect two objects with a line. Once connected, the lines stay attached when you move, resize, or reshape the objects. Besides these drawing tools, you find the eyedropper tool (to "pick up" fill and pen settings) and the note tool (to create electronic comments or reminders) on the draw tools palette.

Click here to expand note

An example note

- **Note** There is a note in the Sample Objects document. Find it and click the control to expand it.

The shape tools palette contains tools to draw a variety of smart shapes—complex geometric objects that are as easy to create as dragging to create a rectangle.



Shape tools

To draw a smart shape:

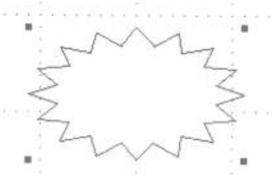
1. **Click the shape tools control on the tool panel to open the palette and drag the pointer to select the starburst tool.**

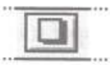
   The pointer becomes a crosshair.

2. **Find a blank place in the drawing area (try between the speech balloon and the 5-point star). Hold down the mouse button and drag the crosshair to draw the object.**

   Press Shift to constrain your dragging to a horizontal, vertical, or 45-degree diagonal direction. Or press Option before you begin drawing to create the object from its center. You see the dotted outline of the object as you drag.

3. Release the mouse button when the object is the size you want.





Smart shadow control

4. If you want, style the starburst with a fill color or gradient and a pen color using the controls in the style bar.
5. Apply a drop shadow by clicking the smart shadow control in the style bar.

Creating models

Use the same technique that you used to draw an object to create a model. Click a model tool and then drag to create the model frame. (With some models, you can also click to set the upper-left corner of the model frame; ClarisImpact then creates the model using a preset size.)

After you define the area for the model, you see the model creation dialog box where you can select a model style as well as other formatting options.

Creating a calendar model

To create a calendar model:

Calendar model tool

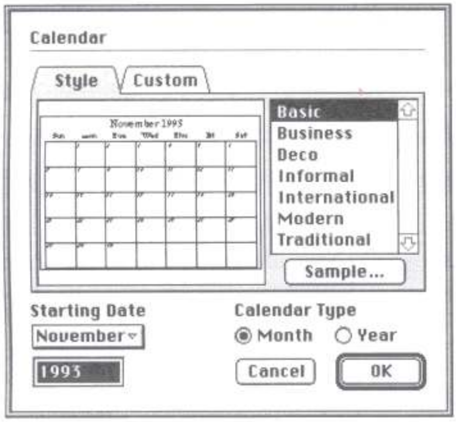
1. First, scroll down to a blank section of the working area (if necessary).
2. Click the calendar model tool and then move the selection arrow into the document.

   The pointer becomes a crosshair.
3. Click in the document window about 1/4-inch from the left margin and 6-1/2-inches from the top margin.

   Use the graphics rulers to help you.

   ClarisImpact places the upper-left corner of the calendar at this spot and sizes the calendar frame using a preset dimension.

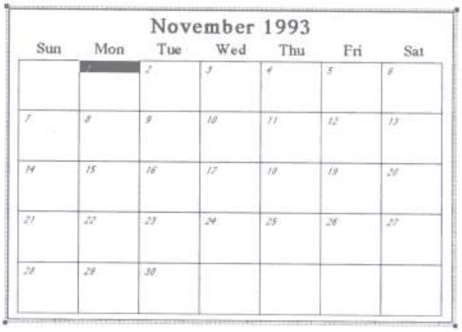
The Calendar dialog box appears. You can select a model style here, but for now, use the **Basic** preset style.



◆ **Note** If the **Style** tab is not selectable in the Calendar dialog box or if no model styles appear in the list box, ClarisImpact cannot find the model style files. Unless you have set new preferences, ClarisImpact expects these files to be stored in a folder named ClarisImpact Color Styles or ClarisImpact B&W Styles inside the ClarisImpact Folder. If you didn't install these files, see "Doing a custom installation" on page 1-9 for help.

4. Click OK.

   ClarisImpact creates a calendar for the current month (or whatever you specify in the Calendar dialog box) using the formatting settings from the Basic model style.



   ClarisImpact automatically extends your drawing area down to accommodate the calendar. Scroll down, if necessary, to see the entire calendar.

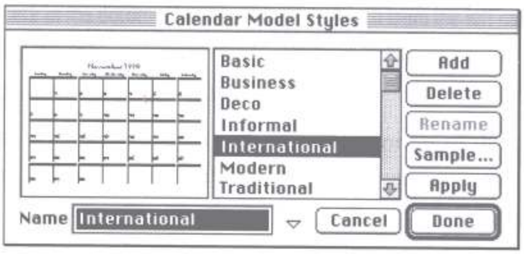
Applying a different model style

The Basic model style is too plain, so you decide to apply a more colorful model style:

1. With the calendar still active, choose **Model Styles** from the Calendar menu.

   You see the Calendar Model Styles dialog box.

2. Select the **International** style and click **Apply**.



The style is applied to your calendar.

You can see a small preview of other styles by selecting a name in the list box. Click **Sample** to see a larger version.

3. Click **Done** when you have finished.

Personalizing your calendar

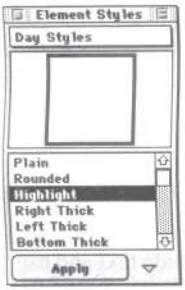
Day styles can be used to style the individual days in your calendar:

1. If you have deactivated the calendar, click to activate it. Select a day to style.

   The day you select is highlighted. The calendar must not only be selected but a day must be active to apply day styles.

2. Choose **Element Styles** from the Calendar menu.

   You see the element styles palette appear, floating above your document. Move it to a corner of your screen so you can see as much of the calendar as possible.



Element styles palette

3. Select a day style from the scrolling list and then click **Apply**.

   The day style is applied to the highlighted day.

4. Scroll through the list and apply other day styles to other days in your calendar.

   You can also double-click a style to apply it.

5. Select a day and type some text. This creates an event for that day.

   Enter a meeting or a colleague's birthday. You see the event text appear on the selected day.

6. Click outside the event text box to deselect it; then click and drag the event to another day.

7. Enter a banner spanning several days. Select the days by dragging across them and then choose **Add Banners** from the Calendar menu.

   Type some text into the banner text box.

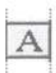
8. Close the element styles palette by clicking the close box.

Here is an example of a calendar formatted with the International model style and several different day styles.

Drawing a text frame

Even though you are working in a draw document, you can include text and use many of the word processing features found in ClarisImpact by using a text frame.

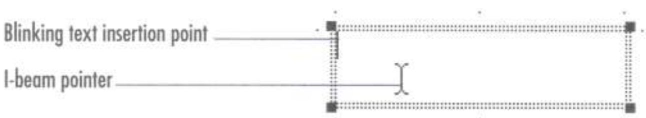
To create a text frame:



Text tool

1. First, scroll down again to a blank section of the working area (if necessary).
2. Click the Text tool.
3. Hold down the mouse button and drag the crosshair to form a rectangular boundary 2 inches across by 1/2-inch high.

   The text frame is similar to other model frames you have created, but it has a blinking bar (the text insertion point) in the upper-left corner of the frame.



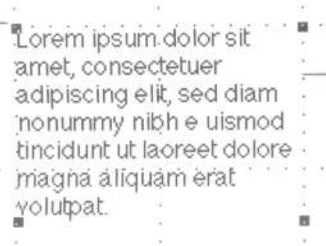
4. **Type your name or any other text.**

   The text appears in the frame as you type. Notice that as you reach the bottom of the frame, it expands to accept more text.

   You can show the text ruler (**Show Text Ruler** on the View menu) or use the commands on the Text menu to format text in a text frame.

5. **Press Enter (not Return), or click outside the frame.**

   Handles on the frame show that it's still selected but not active.

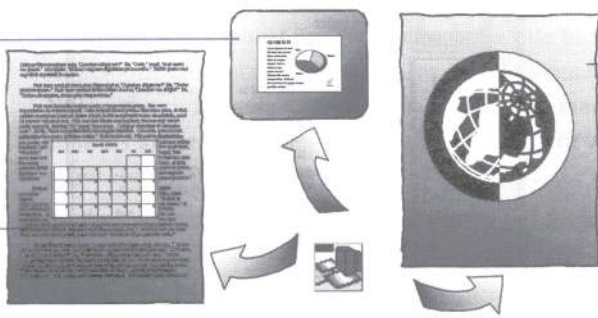


You can move or style the frame when it's selected.

Understanding document types

As discussed, you can work with three different types of documents in ClarisImpact: drawings, reports, and presentations. Each type has a specific use and a corresponding format and output.

Take a moment to become familiar with what each document type does best. Remember that you can use any of the program's model tools in each of the different ClarisImpact document types.



Drawing documents

Create a drawing document when you want charts or drawings to print on multiple pages and when you want more flexibility in placing a chart or model. With a drawing document, the document page can grow horizontally and vertically as you work. Drawing guides such as a graphics grid and graphics rulers help you place objects precisely.

Report documents

Create a report document when you want consecutive pages with the option of using a title page, headers, footers, and footnotes. Report documents can also have multiple columns.

Presentation documents

Create a presentation document when you want to produce overhead or slide presentations or deliver an onscreen slide show. A presentation document uses the same background on each slide and reserves areas on each slide for a title and a body.

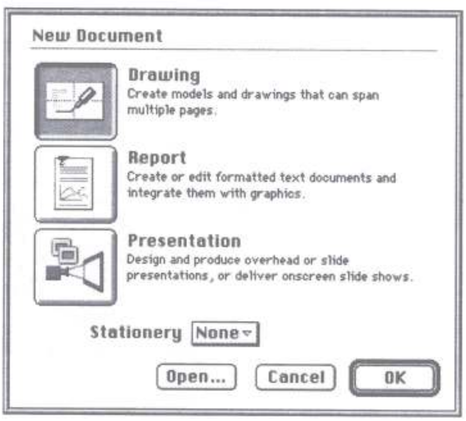
Creating a new document

Now that you're familiar with the different types of ClarisImpact documents and what they're used for, you're ready to practice creating new ones.

To create a new document:

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

   You see the New Document dialog box.



2. **Double-click the Drawing button (or press Command-1).**

   A new drawing document opens. You won't do anything with this document, but take a moment to examine it.

   The new document is named **Untitled 1 – Drawing**. The number shows how many documents you have opened during the session; it may vary from the illustrations shown in this manual.

   Notice the grid of dotted lines in the drawing area. This is the graphics grid which is preset to be visible in a drawing document. The **Autogrid** command (on the Layout menu) is also preset to be active.

3. **Choose New from the File menu again.**
4. **In the New Document dialog box, double-click the Report button (or press Command-2).**

   A new report document opens on top of the drawing document. A report document has **Report** in its title bar.

   You see gray page guides indicating the page margins. Also notice the text ruler at the top of the document window with controls for tabs, line spacing, justification, and columns. The blinking text insertion point appears in the top-left corner of the document working area.

5. **Choose New from the File menu once more.**
6. **In the New Document dialog box, double-click the Presentation button (or press Command-3).**

   This time, before the presentation document is created, you see the Master Slide dialog box, which looks very similar to the model creation dialog boxes you have already worked with in this tutorial session. It is used for the same purpose: to allow you to use predesigned style settings to format your work quickly and easily.

7. **For now, click Cancel. (You will use a master slide style in chapter 6, "Putting it all together in a presentation.")**

   A new presentation document opens on top of the other open documents. A presentation document has **Presentation** in its title bar. You see the master slide of the presentation, with master placeholders for title and body text. Notice the slide navigation controls and pop-up menu next to the zoom controls in the bottom-left corner of the document window and the slide show control in the upper right.

8. **Use the Tile command on the Window menu to arrange all the document windows so you can see them.**

◆ **Note** You can open as many documents as your computer's memory can accommodate. For information about adjusting the amount of memory set aside for ClarisImpact, see "Adjusting memory" on page 1-13 or the Troubleshooting section of the ClarisImpact onscreen Help system.

You will learn much more about these document types and what you can do with them in the rest of the tutorial.

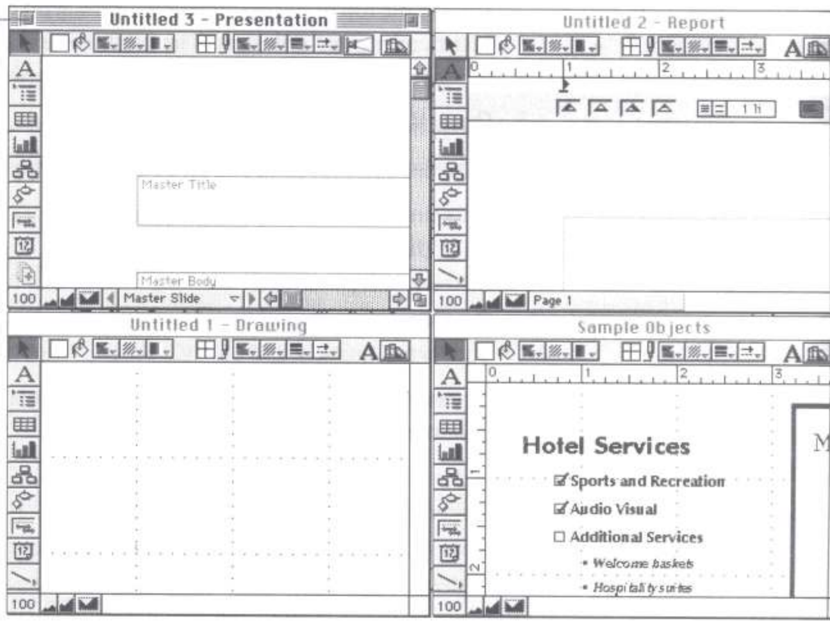
Closing the practice documents

You're near the end of this session, so close the new documents you've just created.

To close the practice documents:

1. **Option-click the close box of the topmost document, or choose Close from the File menu while pressing Option.**

Close box



Using Option causes ClarisImpact to close all open documents.

If you've made any changes to a document, ClarisImpact asks if you want to save them.

2. **If you see the Save Changes dialog box, click No.**

   You'll learn to name and save your documents in the next chapter.

   All the open documents close until only the ClarisImpact menu bar is left on the screen. (Documents from other applications that are running may be visible behind ClarisImpact.)

   If you plan to go immediately to chapter 3, skip the next step.

3. **Press Command-Q or choose Quit from the File menu.**

   You exit from ClarisImpact and return to the Macintosh desktop.

Finishing up

You've now seen how easy it is to use ClarisImpact to create and edit well-designed business graphics and have explored some basic concepts.

You've examined ClarisImpact objects and models, applied model styles, and created new documents. You are now ready to apply the concepts learned in this chapter to the rest of the tutorial—or to your own work.

Where to go from here

For more information on how to use any of the tools introduced, or on other topics covered in this chapter, refer to the *User's Guide*.

For information on	See this chapter in the *User's Guide*
What document type is best suited for your project	"ClarisImpact document types" in chapter 1
Using onscreen Help	"Using onscreen Help" in chapter 1
Models, model elements, and model styles	Chapter 3, "Understanding models and styles"
Organization charts, flow charts, tables, data charts, timelines, outlines, and calendar models	Chapter 4, "Making organization charts," chapter 5, "Making flow charts," chapter 6, "Making tables," chapter 7, "Making data charts," chapter 8, "Making timelines," chapter 9, "Making outlines," chapter 10, Making calendars"
Drawing documents	Chapter 11, "Drawing"
Using the autogrid or graphics rulers, or creating a multipage drawing document	"Working with drawing documents" in chapter 11

For information on	See this chapter in the *User's Guide*
Using the draw and shape tools	"Using the draw and shape tools" in chapter 11
Using the PointGuide™ and the size palette	"Using drawing guides" in chapter 11
Using the style bar and the smart shadow control	"About the palettes" in chapter 11 and "Filling an object" and "Changing an object's pen settings" in chapter 12
Manipulating ClarisImpact objects	Chapter 12, "Working with objects"
Using the SmartAlign™ palette and the SmartSize™ controls	"Aligning objects" and "Resizing objects" in chapter 12
Report documents	Chapter 13, "Working with text"
Presentation documents	Chapter 14, "Making presentations"

Chapter 3

Managing your staff with an organization chart

Chapter 3

Managing your staff with an organization chart

Imagine that you are the Executive Assistant to the General Manager of the Continental Hotel, a medium-sized upscale hotel targeting the business traveler. You are charged with keeping the hotel's organization chart current. You've learned that some personnel changes have been made by the executive staff, and you need to update the organization chart.

This chapter shows how easy it is to create and update an organization chart with ClarisImpact. After completing it, you will know how to:

- import a text outline into ClarisImpact and create an organization chart from it
- apply a predesigned model style to your organization chart
- easily "transfer" an employee from one position to another in your chart
- use the onscreen position controls to add a new position quickly
- change the layout and orientation of the chart
- store the finished chart in a ClarisImpact SmartSymbol™ *library*

Beginning your work

As you learned in chapter 2, a drawing document is the most flexible ClarisImpact document in which to create a chart or *model*. Start ClarisImpact (if necessary) and create a new drawing document. (See "Creating a new document" on page 2-22 for details.)

- **Note** In this session and throughout the tutorial, you can follow the examples or use the text as a guide to help you work on your own documents.

Now is a good time to activate the graphics ruler. It helps you place objects precisely in your drawing. Choose **Show Graphic Ruler** from the View menu. You see rulers appear across the top and along the left side of your document window. Also, activate **Autogrid** (by choosing it on the Layout menu) if it does not have a checkmark beside it.

You are now ready to import the outdated organization chart information and modify it.

Retrieving the current organization data

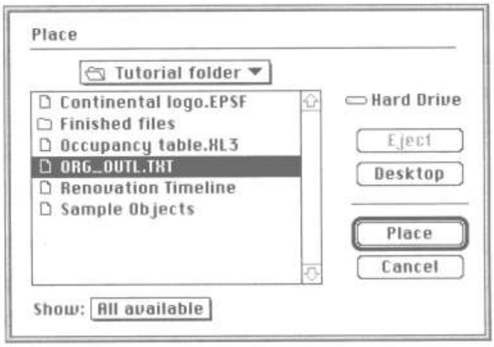
The information you will use to build the new organization chart has been exported from a Claris FileMaker® Pro for Windows database and then saved as a ClarisImpact text file. You can easily create an organization chart from scratch, but this way, you don't have to retype the data.

To import this file:

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

   You see the Place dialog box with a list of document names. Make sure that **All available** is selected in the filters pop-up menu.

2. Navigate to the Tutorial folder (if necessary) and select **ORG_OUTL.TXT**.



3. Click **Place** (or double-click the name).

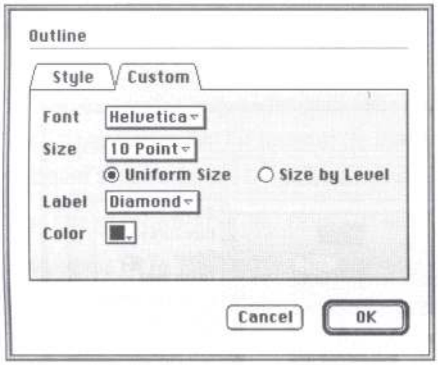
   You see a text frame appear on your screen filled with names and titles that are indented to indicate hierarchy.

In ClarisImpact, to create an organization chart from text, first convert the text frame to an outline model. Then, convert the outline model to an organization chart model:

1. Make sure that the text frame you just created is selected.
2. Choose **To Outline** from the Text menu.

   You see the Outline dialog box appear. Because you're not interested in the formatting of the outline (it is only an intermediate step), select the simplest formatting.

3. Select the **Custom** tab at the top of the dialog box. Then choose **10 Point** from the **Size** menu and click **Uniform Size**.



4. Click **OK** to accept the settings.

   You see the text reformat into an outline and the Outline model menu appears in the menu bar. Don't worry about how the text appears. You will be converting it into an organization chart model next.

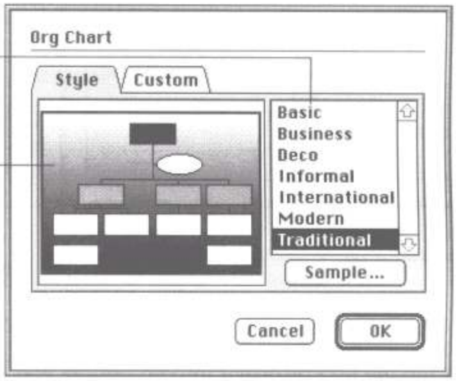
5. Choose **To Org Chart** from the Outline menu.

   A message appears warning you that by converting an outline to an organization chart, you will lose any outline formatting you have applied. Because you are not interested in how the outline is formatted, click **Yes**. You see the Org Chart dialog box with the **Style** tab selected.

◆ **Note** If no model styles appear in the list box, ClarisImpact cannot find the model style files. Unless you have set new preferences, ClarisImpact expects these files to be stored in a folder named ClarisImpact Color Styles or ClarisImpact B&W Styles inside the ClarisImpact Folder. If you didn't install these files, see "Doing a custom installation" on page 1-9 for help.

Select the Traditional style from the list box

See a preview of the selected style here



You see a list of organization chart model styles in the list box on the right. As discussed in "Models and model styles" on page 2-7, using a model style to format your organization chart is an easy way to achieve good-looking results.

6. Select the **Traditional** style from the list.

   The ClarisImpact Traditional style is used for reports and documents throughout the hotel's other departments.

   To see a small preview of another chart style, select its name in the list box. Click **Sample** to see a larger version.

7. Click **OK** to accept the settings.

   ClarisImpact creates an organization chart from the information you imported. It is formatted using the specifications stored in the Traditional organization chart model style.

Model selection arrow

Let's reposition the chart and change the magnification to see the chart better:

1. **The model should be still selected (black selection handles appear at each corner).**

   When you position the selection arrow over the model it should look like the picture to the left. (If you're having trouble selecting the model, see "Working with models and objects" on page 2-8.)

2. **Position the selection arrow in the upper-left area of the model frame (but not on a selection handle) and drag so that the corner of the frame is positioned about 1/4-inch from the document's top border and 1/4-inch from its left border.**

   Use the graphics grid and rulers to help you.

3. **Now, choose Fit To Window from the View menu.**

   ClarisImpact reduces the magnification of your view so that you can see all of your document. But this is too small, especially if you don't have a large monitor.

You can set up and save a specific *view* of a document if you know that it is one that you will need to reference frequently. ClarisImpact records the magnification and location of this view within the document and saves it with the document.

To save a view of the entire organization chart:

1. **Use the fractional zoom control to set the magnification so that you can see all of the organization chart.**

Fractional zoom control

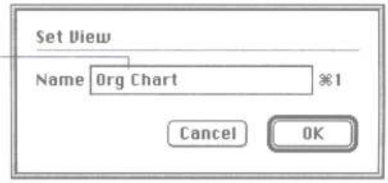
   Click this control, located in the bottom left of the document window. When you move the pointer over the document window, you see a small magnifying glass. Draw a selection rectangle around the area that you want to enlarge. When you release the mouse button, the area you selected fills the window.

2. **Choose Set View from the View menu.**

   You see the View dialog box. You can assign a name to the view you are recording.

3. **Type** `Org Chart` **and click OK.**

After you click OK, the name you type appears in the View menu



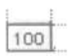
Now, if you are viewing another area of your drawing or are at a different zoom magnification, you can quickly switch to an overview of your organization chart by choosing **Org Chart** (or whatever name you typed) from the View menu.

Examining the chart

Take a moment to examine the organization chart. It is an example of a ClarisImpact *model*, a self-contained business graphic that uses built-in intelligence to help you create and format it. The boxes, or *positions*, are automatically aligned and similarly formatted. Each position within a level has the same look. For more information about models and model styles, refer to "Models and model styles" on page 2-7.

Updating the organization chart

Now that you have the organization chart in your drawing, you can update it. You will edit the chart to reflect an internal transfer, and then add a new position to fill the vacancy caused by the transfer.



Zoom percentage box reset to 100%

- Before you begin working with the chart, reset the magnification level to full size by clicking once in the zoom percentage box in the lower-left corner of the document window.

  Scroll so that you can see the lower-left section of the chart.

Editing the chart to reflect a transfer

Before the personnel changes, Grace Hirose was the Room Service Manager for the hotel. She has been transferred to the position of Facilities Manager in the Engineering department.

To "transfer" a position box from one part of the organization chart's hierarchy to another, you drag the box over the appropriate edge of the position adjacent to where you want the transferred position. ClarisImpact gives you visual feedback when you're in the right spot.

To transfer Grace Hirose in the hotel organization chart:

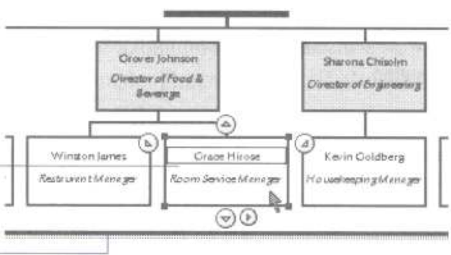
Chart with selection handles

1. **Deselect everything by clicking twice in a blank area of the drawing. Then select the chart by clicking it once.**

   You see selection handles at each corner of the chart frame. Notice that the OrgChart menu also appears in the menu bar. The OrgChart menu appears only when an organization chart model is selected. Some of the choices on the menu are available only when an organization chart *element* (such as a position or a connector) is selected.

2. **Select the Room Service Manager position by clicking that box in the chart.**

   The *add element controls* appear around the selected position. A double-dotted line appears around the model frame and, because the model is active, the gradient background temporarily becomes white.



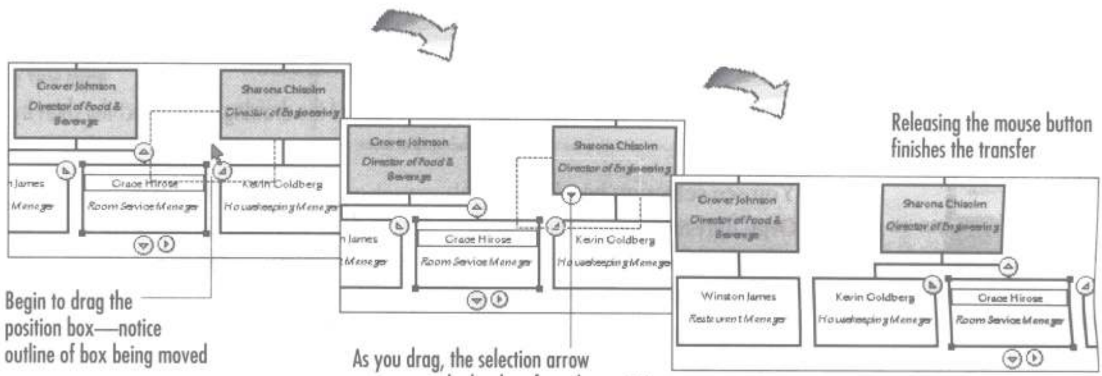
Position selected—notice the add element controls

Double-dotted border around selected and active model

   You will use the add element controls in the next section.

3. **Now, drag the position box up a bit and then over the lower edge of the Director of Engineering position (Sharona Chisolm).**

When you drag a position box over another position's border, the selection arrow changes to show how the position you are moving will be connected.



Releasing the mouse button finishes the transfer

Begin to drag the position box—notice outline of box being moved

As you drag, the selection arrow passes over the border of another position and changes to indicate a possible transfer. Here it shows a possible subordinate position.

In this case, the pointer points down, indicating a possible connection for a *subordinate* position.

4. **When the pointer changes to a downward pointing arrow enclosed in a circle, release the mouse button.**

   You also could have moved the position box over the right or left border of the Housekeeping Manager's position (**Kevin Goldberg**): the pointer would have indicated a possible connection for a *co-worker* position. Moving the position box over the bottom edge of the Housekeeping Manager's position would have created a subordinate to Mr. Goldberg; over the top edge, a manager.

5. **Try any of these possibilities for fun. If you do experiment, choose Undo Re-Org after each change.**

You now have Grace Hirose reporting to Sharona Chisolm in the Engineering department. All that's left to do is to edit Ms. Hirose's title:

1. **If it's not already selected, click Grace Hirose's position.**

   You see the selection handles around the position and the add element controls when it is selected.

2. **Triple-click the words Room Service Manager.**

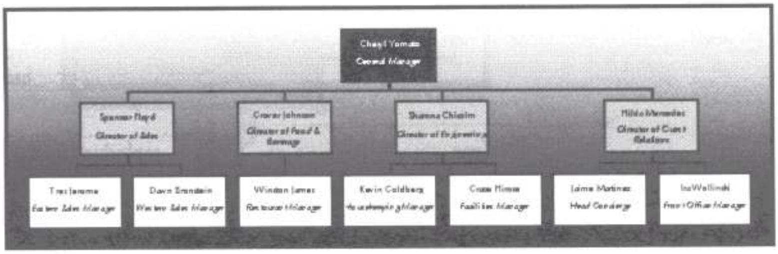
The entire title is selected. (Double-clicking selects a word; triple-clicking selects a line.) You can also choose **Select All** from the Edit menu.

3. **Type** `Facilities Manager`.

   The words you type replace the highlighted text.

4. **Deselect the position box by clicking outside the model frame.**

   Good work! You've finished the first part of the update. Your organization chart should look like this:



Saving your work

It's important to save your document every few minutes or after you've completed a task. That way, you'll always have a recent version of your document on disk.

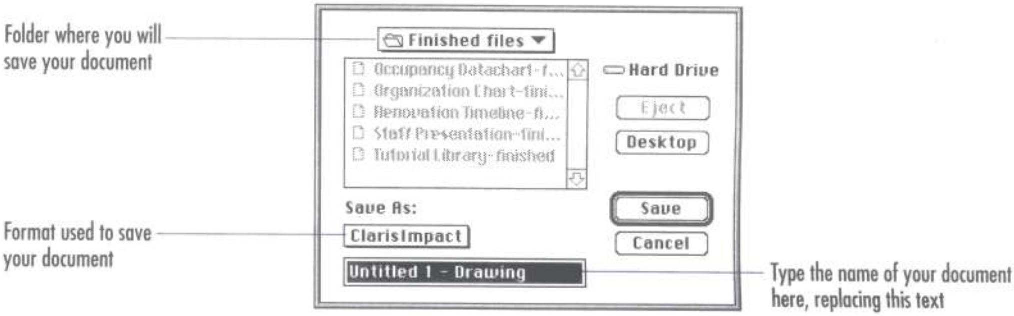
- **Note** Frequently saving your document also provides you with a recent version to go back to if you change your mind about something and it's too late to use the **Undo** command. The **Revert** command on the File menu allows you to retrieve the most recently saved version.

To name and save this document:

1. **Because you are saving the document for the first time, choose Save As from the File menu.**

   You see the Save As dialog box.

2. Navigate to the Tutorial folder, if you need to, and double-click the **Finished files** folder to make it current.



3. Type `Organization Chart`, replacing **Untitled 1 – Drawing.**
4. Click **Save.**

   The document is saved on your disk and remains open for you to continue working on.

Now that you have saved the document once, next time just choose **Save** from the File menu, or press Command-S.

Adding a new staff member

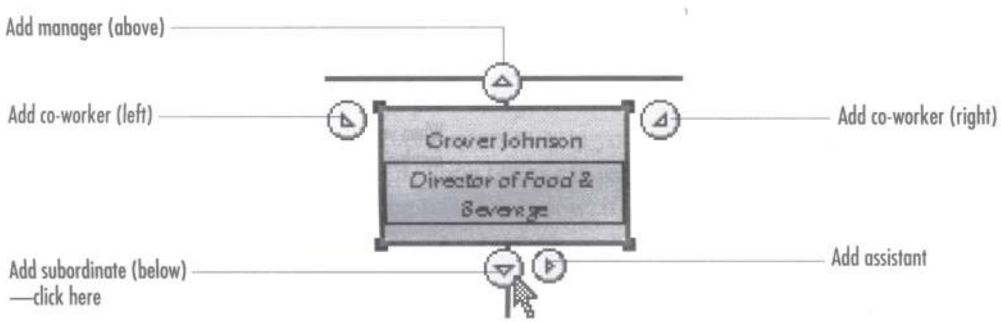
To complete the update to the hotel organization chart, you need to add a position for the newly hired Room Service Manager position vacated by Grace Hirose. You have been notified that Zoe Gunther has been hired to fill that position.

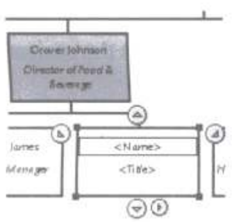
ClarisImpact provides several ways to add positions easily to your organization chart. You can use the add element controls (that you've already seen), type keyboard shortcuts, or choose commands from the OrgChart menu.

The most flexible way to add elements to your chart is to use the add element controls that appear when a position is selected:

1. **Select the Director of Food and Beverage position in the chart.**

   You see the add element controls around the selected position.





2. **Click the add subordinate control to add a new position box.**

   A new position box appears under the Director position and next to the Restaurant Manager position.

3. **The <Name> label in the newly created position box is already selected, so type** `Zoe Gunther`.

   What you type replaces the label.

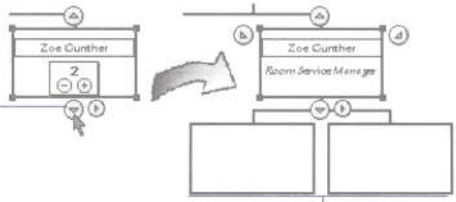
4. **Press Tab to move to the next field, <Title>, and type** `Room Service Manager`.

Now, for practice, add two subordinates to the Room Service Manager position using the following method:

1. **Make sure the Room Service Manager position is still selected.**
2. **Press and hold Shift as you click the add subordinate control twice. Continue holding Shift down.**

   Use the Shift key to add multiple positions at once. The number of times you click indicates the number of positions to create. Notice the small panel displaying the number of new positions to be added as well as plus (+) and minus (–) controls. If you click too many times, click the minus control to subtract from the total.

3. **Release the Shift key when the panel reads 2.**



Press and hold Shift while clicking the add element control to add multiple positions

When you release the mouse button, the number of positions that you clicked appears

You see two empty position boxes appear under the Room Service Manager position. Notice how the rest of the organization chart reformats to make room for the new positions. You may need to scroll to see this.

4. **Because you don't need them, choose Undo New from the Edit menu.**

When you are entering names and titles from the keyboard, perhaps the easiest way to create new positions is using keyboard commands:

To add this kind of position	Press
Subordinate	Return
Manager	Shift-Return
Co-worker right	Option-Return
Co-worker left	Shift-Option-Return

You can quickly enter several positions and the data associated with them using this technique.

You have now finished updating the Continental Hotel organization chart. Next you will change the chart layout and orientation to make it fit better on one page.

Manipulating the organization chart

You have complete control over the appearance of your chart. The fill colors, line weights, fonts, and other chart formatting information are applied through the model style you choose. You can modify any of these settings individually if you wish, using the ClarisImpact style bar (see "Using the style bar" on page 2-9) or commands on the OrgChart menu.

ClarisImpact makes "smart" decisions about the choices you make. You have already seen the intelligence of the organization chart model work in tandem with smart connectors to help you transfer a position. If you resize a position box, all the position boxes can resize to match, depending on the settings in the Sizing dialog box. Try it now, if you like.

You use the *element styles palette* and the Level Settings command to create consistently formatted position boxes in organization charts. Using a predefined model style takes care of the details for you. In fact, model styles store all of the formatting options controlled by commands on the OrgChart menu. For more information, see chapter 4, "Making organization charts," in the *User's Guide*.

Modifying the position layout

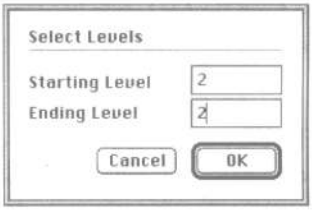
The position layout commands on the OrgChart menu control how groups of positions are arranged. The **Worker Layout** command controls the arrangement of the subordinate positions directly associated with the selected position or positions. Similarly, the **Assistant Layout** command controls the arrangement of assistant positions reporting to the selected position or positions.

Change the worker layout for the second level of the chart so it fits better on your page.

- First, choose your custom view, **Org Chart** (or whatever name you typed earlier), from the View menu so that you can see the entire chart.

To specify the new arrangement:

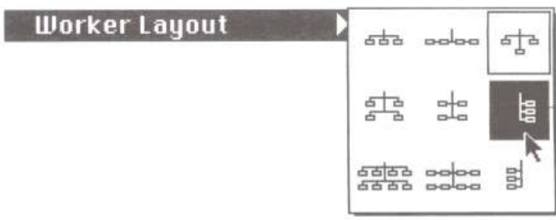
1. Select the four director positions by choosing **Select** and then **Levels** from the OrgChart menu. Enter 2 for both **Starting Level** and **Ending Level**. Click **OK**.



You can also select the four position boxes directly in the chart by dragging a selection marquee around the boxes, being careful not to select any other positions or connectors.

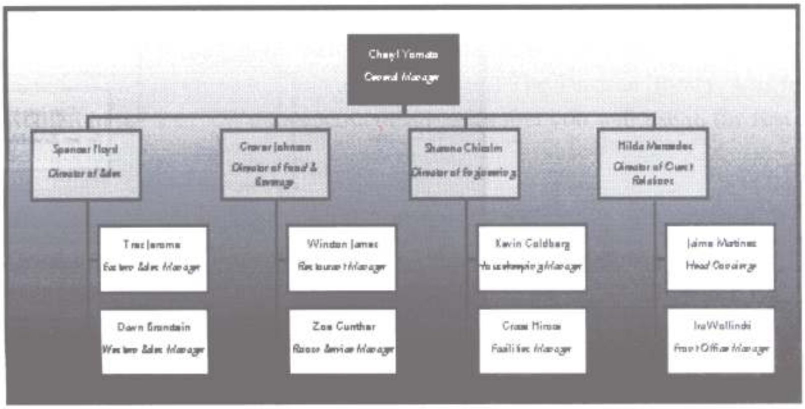
Remember that the **Worker Layout** command affects only the layout of the positions directly reporting to the selected positions. In this case, it affects the positions reporting to the positions you have selected on level two—in other words, all eight manager positions on level three.

2. Choose **Worker Layout** from the OrgChart menu and then, from the submenu, choose the layout illustrated here.



Choose this layout

You see the change reflected in the chart.



Changing the orientation

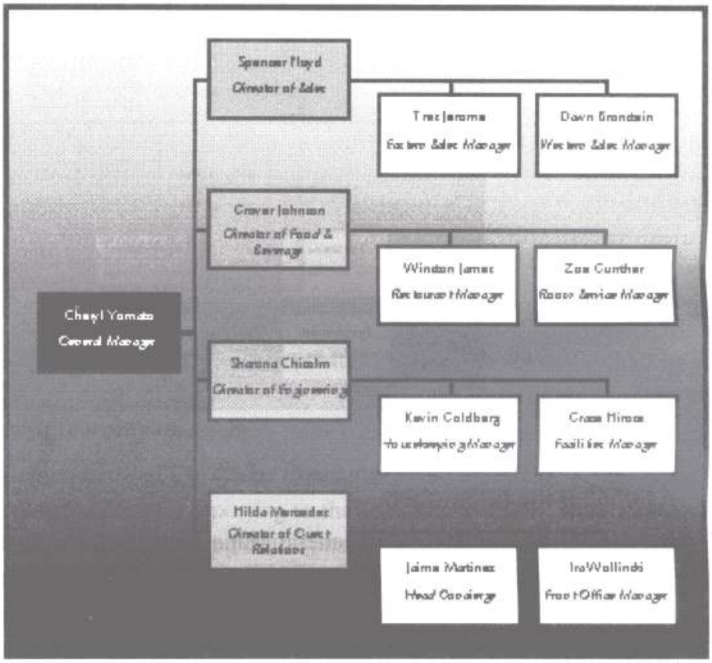
Your boss, the General Manager of the hotel, reviews your work and suggests that you change the orientation of the chart so it seems less hierarchical. You change the *direction* of the chart so instead of flowing from top to bottom, it has a left-to-right orientation.

The **Direction** command on the OrgChart menu affects the entire organization chart, unlike the layout command you used in the previous section.

To change the orientation, or direction, of the organization chart:

1. Select the chart (if it's not already selected).
2. Choose **Direction** from the OrgChart menu and then, from the submenu, choose the left-to-right option.

You see the change reflected in your chart.



3. **Reposition the chart by clicking outside the model frame to deactivating it and then dragging the frame down and to the left until you can see the top of the frame again.**

   Use the same technique that you used earlier to reposition the chart (on page 3-7).

   You can also drag the active model frame by positioning the selection arrow directly over the double-dotted frame border. The arrow becomes black when you're in the right spot.

Finishing up

In chapter 4, you'll be working with a different document—finishing a timeline chart for a renovation to the hotel lobby. Now you need to store your updated organization chart in the Tutorial library and then save and close the document.

Storing the chart in a library

Because you will be using the finished organization chart later in the tutorial, store it in a ClarisImpact *library*. (A library is similar to a scrapbook, where you can store often-used graphics and text. ClarisImpact comes with an extensive collection of clip art contained in a set of libraries.) The Tutorial library, which is installed in the Tutorial folder, contains images that you will use in the rest of the tutorial.

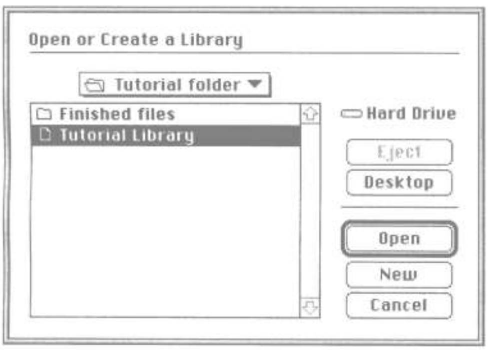
To store the organization chart in the Tutorial library:

Library control

1. Click the library control in the upper-right corner of the document window (or choose **Open Library** from the File menu).

   You see the Open Library dialog box.

2. Navigate to the Tutorial folder (if necessary) and select **Tutorial Library**.



3. Click **Open** (or double-click the name).

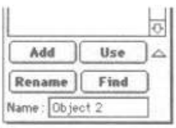
   You see the library palette appear. It floats above the document window so it is always available. You can still work in the document window while the library palette (or any palette) is open. Move it to a corner of your screen so it's out of your way.

Icons representing the images stored in the library are arranged in a matrix in the library palette.

4. **With the organization chart selected in your document window, click Add at the bottom of the library palette.**

   Make sure the chart is selected but not activated. You see selection handles at each corner.

   The icon for the updated chart appears in the library palette. It is named **Object 2**.



Library options

5. **Click the triangle near the bottom of the palette to see more options.**

   You see the **Rename** and **Find** buttons, along with a **Name** text box.

   The icon for the organization chart should still be selected. If the icon is not highlighted and you don't see **Object 2** in the entry box, click the icon to select it.

6. **Select the text in the box and replace it with `Org Chart`. Click Rename.**
7. **Click the close box in the upper-left corner of the library palette. Click Yes in the dialog box that appears prompting you to save.**

By placing the updated organization chart in a library, you have made it available anytime you need it. You will use this library in chapter 6, "Putting it all together in a presentation."

Closing the drawing

To save and close the document:

1. **Choose Save from the File menu.**
2. **Choose Close from the File menu or click the close box at the top-left corner of the document window.**

   The document window closes, leaving ClarisImpact running with no documents open.

If you want to take a break, quit ClarisImpact by choosing **Quit** from the File menu. Or you can continue with chapter 4, "Managing a project with a timeline chart."

Where to go from here

With the help of the ClarisImpact "smart" organization chart tool, the time-consuming task of frequently updating the hotel's organization chart is now easy. And you've only scratched the surface of the organization chart model's capabilities.

Further, by learning about the organization chart model tool, you also now know the basics of how the ClarisImpact flow chart model works.

For more information on how to use the organization chart tool or other topics covered in this chapter, refer to the *User's Guide*.

For information on	See this section in the *User's Guide*
Changing the zoom magnification	"Getting a closer look at your document" in chapter 2
Importing files from other programs	"Importing, placing, and exporting documents" in chapter 2
Setting a custom view	"Viewing a document" in chapter 2
Models, model elements, and model styles	Chapter 3, "Understanding models and styles"
Working with organization charts	Chapter 4, "Making organization charts"
Auto sizing organization chart position boxes	"Changing the position size" in chapter 4
Building your own organization chart model style	"Creating, deleting, or renaming organization chart model styles" in chapter 4

For information on	See this section in the *User's Guide*
Reorganizing your organization chart	"Moving a position" and "Changing a connection" in chapter 4
Specifying default values for position box styles, data field prompts, and chart layout for your organization chart	"Using Level Settings" in chapter 4
Specifying what data fields appear in the position boxes	"Using organization chart element styles" in chapter 4
The variety of ways to add positions to your organization chart	"Building an organization chart" in chapter 4
Working with flow charts	Chapter 5, "Making flow charts"
Using libraries to store objects	"Working with library objects" in chapter 12
Checking the spelling of text in an organization chart	"Using the spelling checker" in chapter 13
Formatting text in a model	"Changing the appearance of text" in chapter 13

Chapter 4

Managing a project with a timeline chart

Chapter 4

Managing a project with a timeline chart

Imagine that you are the Facilities Manager for the Continental Hotel. You have learned that the hotel's executive committee has approved plans to modernize the lobby. You have approximate dates and schedules, but you need to plan the whole project in an organized fashion.

This tutorial session shows you how ClarisImpact makes it easy to track projects with a timeline, or Gantt, chart. After completing the chapter, you will know how to:

- interpret a standard timeline chart
- enter data for timeline tasks
- edit tasks using a variety of methods
- format your timeline chart using a predefined timeline model style

Beginning your work

To begin, you need to open the ClarisImpact drawing document containing the sample timeline. It is called Renovation Timeline and is located in the Tutorial folder.

To open Renovation Timeline:

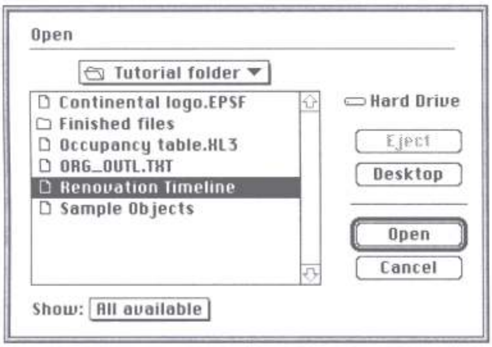
1. **If necessary, start the ClarisImpact application.**

   Refer to "Starting ClarisImpact" on page 2-3 if you need help.

2. **If you have just started ClarisImpact, click Open in the New Document dialog box or, if the application is already running, choose Open from the File menu.**

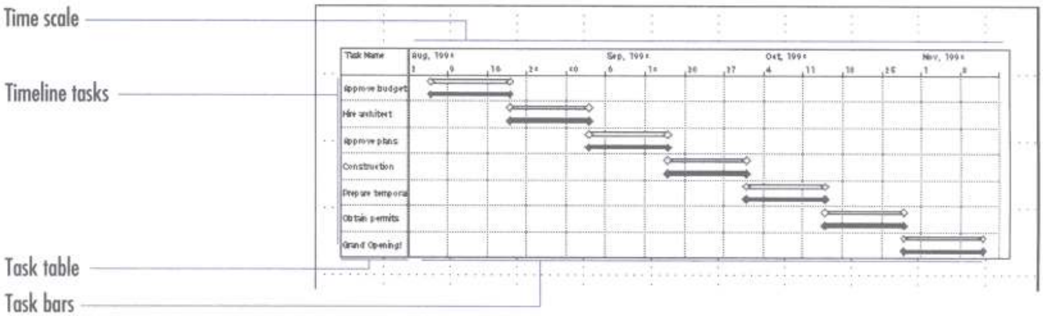
   You see the Open dialog box.

3. **Navigate to the Tutorial folder, if necessary, and select Renovation Timeline.**



4. **Click Open (or double-click the name).**

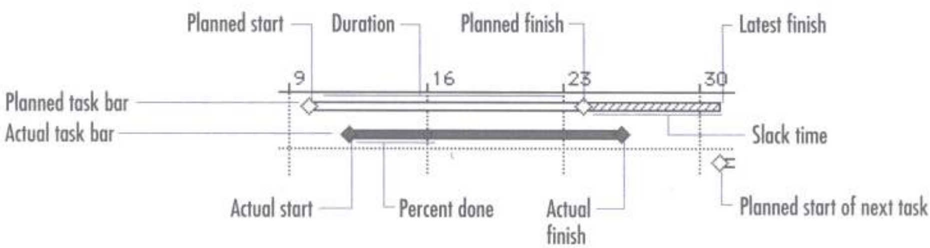
Renovation Timeline, a ClarisImpact draw document, opens on your screen.



Examining the timeline chart

With a timeline chart, you can manage the lobby renovation project by breaking it down into *tasks*. The seven tasks and a starting date for the project have already been entered, but you need to enter more information, such as task durations, to complete the chart.

You can track the progress of the project graphically by examining the chart. Each task is represented by horizontal *task bars* on a time scale. The values you have entered are represented by symbols on these bars. These include planned start and planned end dates (or duration, if you're not sure of the end date), actual start and end dates, percent complete, and latest finish date. Any time between the planned finish date and the latest finish date is called *slack time*.



◆ **Note** You can also import data for a timeline from a variety of spreadsheet programs, including Claris Resolve, Microsoft Excel (3.0 or earlier), or any other program that can export in DIF, SYLK, or tab-delimited text format. See chapter 8, "Making timelines," in the *User's Guide* for more information.

Tasks are initially listed in chronological order from top to bottom. Notice that the latest finish for the first task shown falls on the same day that is scheduled for the planned start of the next task. ClarisImpact can keep track of these dates for tasks that are *linked*, and automatically reschedules tasks when the dates for an earlier task change. (To keep a task from being linked to the previous task, just specify a planned start date instead of leaving that cell in the task table blank.)

You don't have to include all of this information for all tasks, ClarisImpact intelligently completes the timeline from the information you provide.

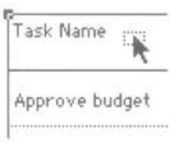
This timeline model has not yet been formatted with a predesigned model style. You'll do that after you finish entering the data.

Entering timeline data

ClarisImpact provides you with a number of ways to enter information into your timeline chart. You can enter data after directly clicking a chart element, or use the controls on the timeline *model bar* that appears when you have activated the chart. Or you can display the timeline *task table* and enter values in it. The task table holds the data for the timeline chart.

Working with the timeline model

Before you can use any of these techniques, however, you must select and activate the timeline model:



Model selection arrow

1. **Click the chart to select it.**

   Black selection handles appear at each corner of the model frame. When you position the selection arrow anywhere over the model, it looks like the picture to the left. Notice that the Timeline menu also appears in the menu bar.

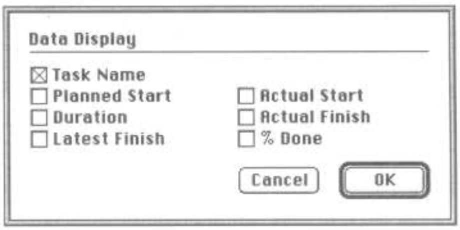
2. **Click the text Approve budget in the task table.**

You see the timeline model bar appear at the top of the document window directly under the style bar. The model bar contains controls to help you enter task data and an entry bar. We'll look more closely at these controls in a moment.

Timeline controls

3. **Now, choose Data Display from the Timeline menu.**

You see the Data Display dialog box, with the **Task Name** item selected.



4. **Keeping Task Name selected, click all the remaining checkboxes in the dialog box.**
5. **Click OK.**

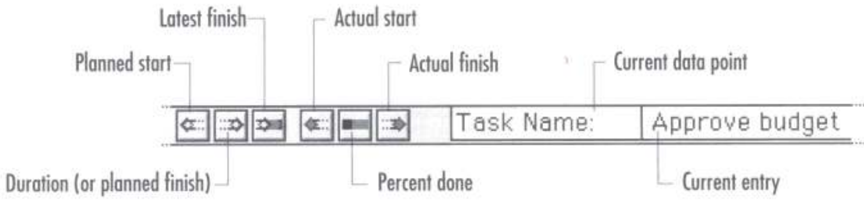
You see the selected items appear as columns in the task table of your timeline chart. The graphical part of the chart is compressed a bit by the expanded table, but because you will be hiding the data table when you finish, it doesn't matter.

Task table with all data items displayed—notice the double-dotted border indicating the model is active

Crossbar pointer

Task Name	Planned Start	Duration in Days	Latest Finish	Actual Start	% Done	Actual Finish
Approve budget	8/6/93	14			0	
Hire architect		14			0	
Approve plans		14			0	
Construction		14			0	
Prepare temporary lobby		14			0	
Obtain permits		14			0	
Grand Opening!		14			0	

Examine the timeline controls in the model bar. Each control corresponds to a column in the task table. If you don't want to display the task table, you can access each symbol in the chart by clicking the appropriate control.



To demonstrate this correspondence:

1. If you have deselected the model, click it and then click the text **Approve budget** in the task table.
2. Press Tab.

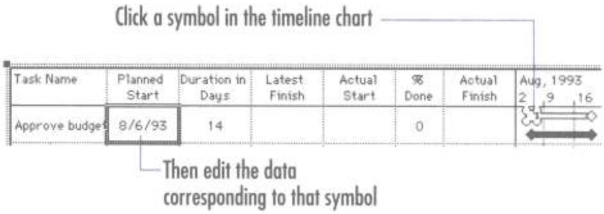
   A number of things happen in the timeline chart. You see the planned start date, **8/6/93**, appear in the data entry bar.

- **Note** The dates for this tutorial assume that the current year is 1993. If it is not, edit the planned start date in the data entry bar to make the year the current one.


Planned start control

Also notice that the planned start control in the model bar is highlighted. If you didn't have the planned start column in the task table displayed, you could click this control to access that date for this task.

The simplest way to edit task data, though, is to click the symbol corresponding to that task data point directly in the chart. Notice the hollow selection circles around the symbol representing the planned start date in the chart. It is selected because you are currently editing that symbol's data.



3. **Try it. Click one of the symbols on the task bars for the Approve budget task and see what data point in the table becomes selected.**

   You cannot yet select some of the data points in this way because they are hidden behind other data point symbols.

4. **Press Tab to move through the rest of the data points for the Approve budget task.**

   Notice how each control in the model bar highlights and each symbol in the chart becomes selected as you press Tab.

Fixing an error

You notice, in looking at the timeline chart, that there is an error in the order of the tasks. The Construction task should come after preparing the temporary lobby and obtaining permits. You also want to widen the Task Name column a bit.

To rearrange the order of the tasks:

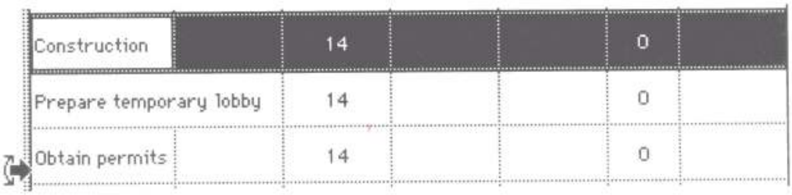
1. **Position your pointer over the left border of the table row that contains the task name Construction.**

   The pointer should look like a heavy rightward-pointing arrow.

2. **Click the mouse and drag down to the Obtain permits row.**

   The selected row highlights. As you drag, the pointer changes shape again to indicate that you are moving a row.

3. When you release the mouse, the Construction task is moved under the Obtain permits task.



Pointer changes to indicate that you are moving rows

Notice that because there is no planned start date specified (in other words, the tasks are dependent on each other, or are *linked* start to finish), the dates in the chart still flow sequentially.

To widen the Task Name column:

1. Position your pointer over the top border of the Task Name column.

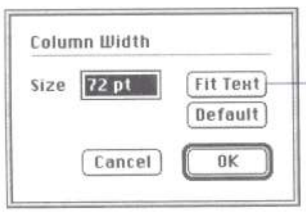
   The pointer should now look like a heavy downward-pointing arrow.

2. Click the mouse.

   The column highlights.

3. Choose **Column Width** from the Timeline menu.

   You see the Column Width dialog box.



Click here to set the column width to accommodate the widest text in the column

4. Click the **Fit Text** button and then click **OK**.

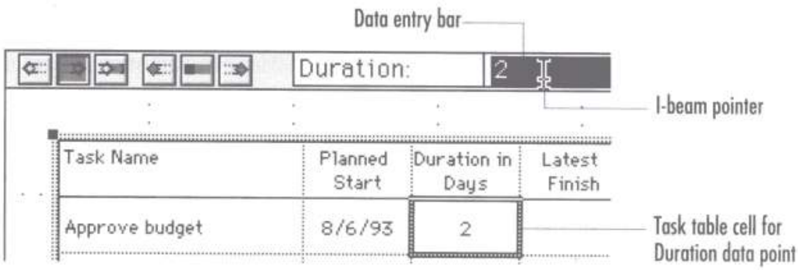
   ClarisImpact calculates the width of the longest text label in this column and adjusts the column width accordingly.

Completing a task

The budget for the renovation project has been approved. You can edit the data for that task to indicate that it has been completed. You know the task duration, the start date, and that the task is complete.

To edit the data for the budget approval, use the task table:

1. **To enter the task duration, click the Duration in Days table cell for the Approve budget task and type** `2`.



   Notice that you are actually typing in the entry bar at the top of the document window. You don't need to click in the entry box; whatever you type replaces the value there. (If you need to edit an entry, use the I-beam pointer in the entry box.)

2. **Press Enter to confirm your entry and update the chart.**

   Both the planned and actual task bars shift left 12 days to reflect this change. In fact, all the bars for the rest of the tasks shift left the same amount because all the tasks are linked start to finish.

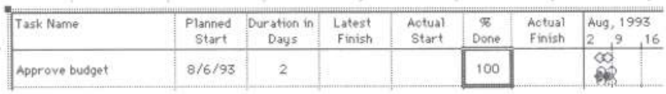
   Unless you enter an actual start date, ClarisImpact assumes that it matches the planned start date. Therefore, because the task was started on time, you don't need to enter a value for **Actual Start**. The only other value you need is the percent done figure.

3. **Press Tab three times to move to % Done.**

   Pressing Tab confirms your entry and moves to the next data point in the current task.

4. **Type** `100` **and press Enter.**

You see the actual task bar change color to reflect that the task is complete.



Saving your work

You want to save a copy of the Renovation Timeline document because this version should stay unchanged in case someone else wants to work through this tutorial session.

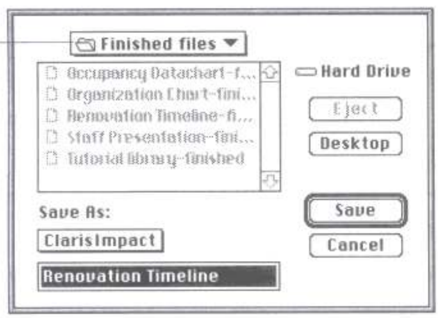
To save a copy of your document:

1. **Choose Save As from the File menu.**

   You see the Save As dialog box.

2. **Double-click the Finished files folder in the list box to make that folder current.**

Folder where you will save your document



3. **Click Save.**

   You don't need to type anything; the file is saved under the same name in the new folder.

Completing the timeline

Now, finish entering the data to complete the task table for your timeline chart.

Editing a task that's ahead of schedule

The original schedule called for seven days to interview and hire an architect. Through the recommendation of the Director of Sales, you have found one immediately, so the actual start date is earlier than you had planned. You are about 90 percent complete with the paperwork for hiring her.

To edit the Hire architect task using the controls in the timeline model bar:

1. Click the task name **Hire architect** in the table.
2. Click the control corresponding to the **Duration in Days** field for the Hire architect task.

Duration control

   Notice the heavy selection border around the duration table cell in the task table and the selected symbol in the timeline model.

3. Type `7` for the duration.
4. Press Tab twice and type `8/6` for **Actual Start**. Confirm your entry by pressing Enter.

   ClarisImpact assumes that the year is the current one and enters it for you.

   The planned task bar remains in the same place in the chart, but the actual task bar shifts to the left to reflect this earlier date. Once again, because the tasks are linked, all the bars for the succeeding tasks shift as well.

5. Press Tab and type `90` for **% Done**. Then press Enter.

Adding durations to the tasks

To complete the renovation timeline chart, you need to enter durations for the remaining tasks:

1. In the Approve plans task, type `7` in the **Duration in Days** field.
2. Press Return to move to the Duration field of the next task.

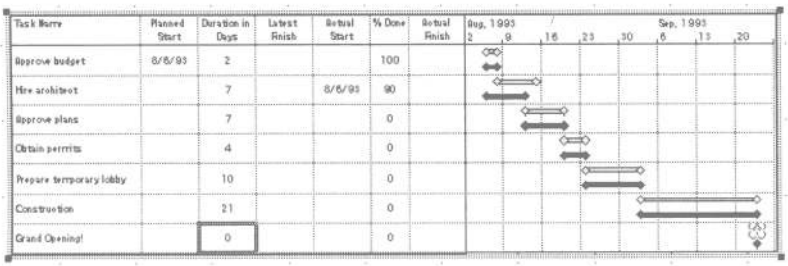
   Pressing Return confirms your entry and moves down a row in the task table.

3. **Type the following durations for each task, pressing Return after each:**

Task	Duration
Obtain permits	4
Prepare temporary lobby	10
Construction	21
Grand Opening!	0

The duration for the Grand Opening task is zero because it is a *milestone*—a reference point in the schedule with no duration associated with it.

Just by entering values for how long each task is expected to take, you have scheduled the entire renovation job through completion. Your timeline model should now look something like this:




Zoom-out control

If you can't see the entire model, try using the zoom out control, located in the bottom-left corner of the document window, or choose **Fit to Window** from the View menu.

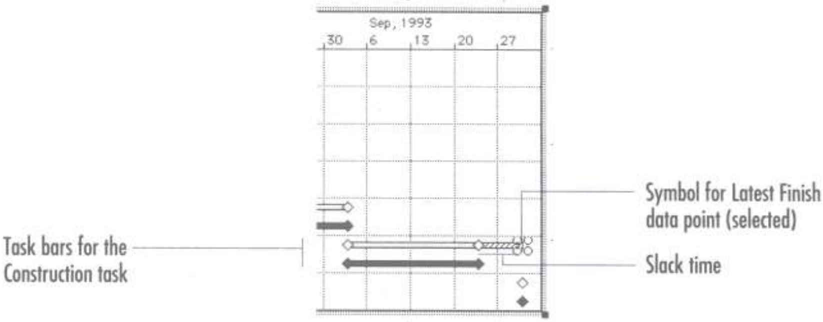
Adding a "hard" completion date

Currently, because all the tasks in your timeline model are linked, the finish dates are floating, and the chart shows the earliest possible completion date for the project. By adding a date to the **Latest Finish** field for a task, you can see where there is any flexibility, or slack time, in the schedule.

You know that the renovation must be done by October 1, and you want to add that information to the timeline:

1. **Click the Latest Finish field for the Construction task, type `10/1`, and press Enter.**

   You see the slack time reflected in the chart.



If you need to, scroll to see the task bars for the Construction task.

Formatting the timeline chart

You can give the timeline chart a more professional look by applying a predesigned model style. (See "Models and model styles" on page 2-7 for more information.) But first, you want to hide the task table because you're done with it.

Hiding the data table

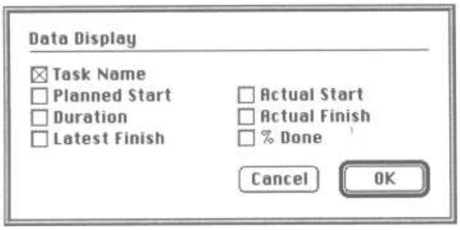
When you show the timeline to others, you probably want to hide the data that supports each task (the dates, duration, and so on) because it clutters the chart. You want to show them only the timeline chart with the task names.

To hide the timeline task table:

1. **Choose Data Display from the Timeline menu.**

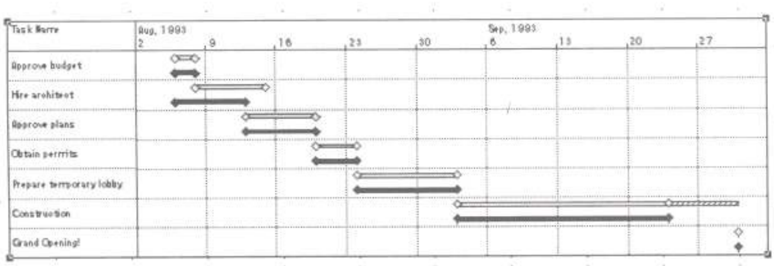
   If **Data Display** is dimmed, make sure the model is active by clicking on a blank area of the model (an area without text or task bars) until you see a double-dotted border around the model frame.

2. **Deselect all the fields except Task Name.**



3. **Click OK.**

ClarisImpact hides the columns you deselected. You also can see more of the timeline chart because it has expanded to fill the model frame.



Applying a model style

A model style controls the format options for the timeline, such as symbols and bar colors for task bars, font color, size, and style for the task table and chart labels, as well as border and fill colors for the model frame. In general, a model style specifies all the settings on the Timeline menu. For a more complete discussion of the timeline model style, refer to chapter 8, "Making timelines," in the *User's Guide*.

To apply a model style to your timeline chart:

1. **Make sure that the model is still selected and that the Timeline menu appears in the menu bar.**

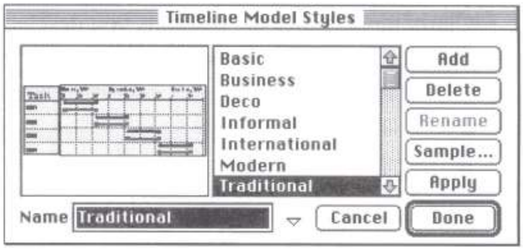
If you cannot see the Timeline menu, you have deselected the model. Click the model frame once to reselect it.

2. **Choose Model Styles from the Timeline menu.**

You see the Timeline Model Styles dialog box.

◆ **Note** If no model styles appear in the list box, ClarisImpact cannot find the model style files. Unless you have set new preferences, ClarisImpact expects these files to be stored in a folder named ClarisImpact Color Styles or ClarisImpact B&W Styles inside the ClarisImpact Folder. If you didn't install these files, see "Doing a custom installation" on page 1-9 for help.

3. **Select the Traditional style and click Apply.**



The style is applied to your timeline model.

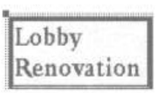
You can see a small preview of other styles by selecting a name in the list box. Click **Sample** to see a larger version.

4. **Click Done when you have finished.**

Adding a title

To complete your timeline chart, you want to add a title.

Use the top-left cell of the task table to add the title:



1. **Click that cell in the task table.**

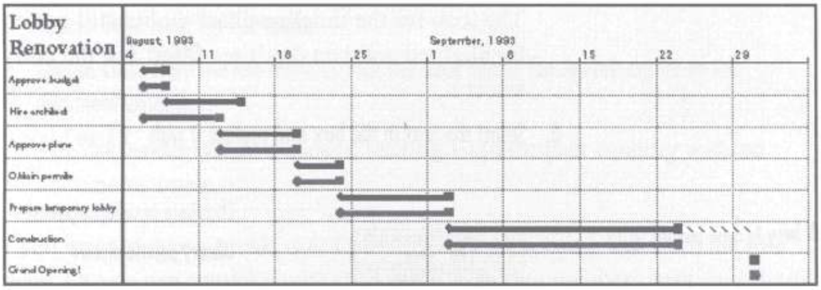
It currently contains the text **Task Name**.

2. **Type** `Lobby Renovation`.

The text you type replaces what was there.

3. **Press Enter to confirm your entry.**

Excellent! Your completed timeline should look something like this:



Finishing up

You've now finished the tutorial session on timeline models. In chapter 5, you'll create a new document to learn about the data charting capabilities of ClarisImpact. Now you need to store your timeline chart in the Tutorial library and then save and close the Renovation Timeline document.

Storing the chart in a library

Because you will be using the finished timeline later in the tutorial, store it in the Tutorial library the same way you did the hotel organization chart in the last chapter:

Library control

1. Click the library control in the upper-right corner of the document window (or choose **Open Library** from the File menu).

   You see the Open Library dialog box.

2. Navigate to the Tutorial folder (if necessary) and select **Tutorial Library**.
3. Click **Open** (or double-click the name).

   You see the tutorial library palette.

4. With the timeline chart selected in your document window, click **Add** at the bottom of the library palette.

   Make sure the chart is selected but not activated. You see selection handles at each corner.

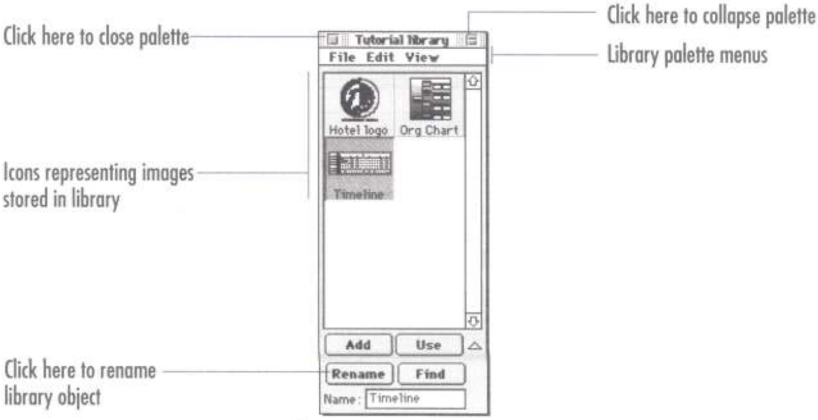
   The icon for the chart appears in the library palette. It is named **Object 3**.

5. If the library options are not visible, click the triangle near the bottom of the palette to see them.

   You see the **Rename** and **Find** buttons, along with a **Name** text box.

   The icon for the timeline chart should still be selected. If the icon is not highlighted and you don't see **Object 3** in the entry box, click the icon to select it.

6. Select the text in the box and replace it with `Timeline`. Click **Rename**.



7. Click the close box in the upper-left corner of the tutorial library palette. Click **Yes** in the dialog box that appears prompting you to save.

By placing the timeline chart in a library, you have made it available anytime you need it. You will use this library in chapter 6, "Putting it all together in a presentation."

Closing the drawing

To save and close the document:

1. Choose **Save** from the File menu.
2. Choose **Close** from the File menu or click the close box at the top-left corner of the document window.

   The document window closes, leaving ClarisImpact running with no documents open.

If you want to take a break, quit ClarisImpact by choosing **Quit** from the File menu. Or you can continue with chapter 5, "Tracking numbers with data charts."

Where to go from here

In this tutorial session, you learned how the timeline tool in ClarisImpact can help you plan an event or project in an organized fashion. You also learned the basics of the ClarisImpact table model by working with the task table in the timeline model.

For more information on how to use the timeline tool or other topics covered in this chapter, refer to the *User's Guide*.

For information on	See this section in the *User's Guide*
Changing the zoom magnification	"Getting a closer look at your document" in chapter 2
Models, model elements, and model styles	Chapter 3, "Understanding models and styles"
Working with timeline charts	Chapter 8, "Making timelines"
Building you own timeline model style	"Creating, deleting, or renaming timeline model styles" in chapter 8
Editing task data points using the controls on the timeline model bar	"Using the model bar" in chapter 8
Changing the appearance of individual task bars	"Changing task bar colors and symbols" in chapter 8
Formatting text in a timeline	"Formatting the task table and timeline text" in chapter 8 and "Changing the appearance of text" in chapter 13

For information on	See this section in the *User's Guide*
Formatting the timeline task table	"Formatting data in cells" and "Changing rows and columns" in chapter 6 and "Formatting the task table and timeline text" in chapter 8
Importing spreadsheet files from other programs into the task table	"Importing, placing, and exporting documents" in chapter 2 and "Importing data" in chapter 8
Using separate task bars or overlaid task bars	"Changing timeline options" in chapter 8
Using the task table to enter data	"Entering and editing tasks" in chapter 8
Understanding linked tasks, or tasks with date dependencies	"Working with linked tasks" in chapter 8
Using libraries to store objects	"Working with library objects" in chapter 12

Chapter 5

Tracking numbers with data charts

Chapter 5

Tracking numbers with data charts

Imagine that you are a sales manager at the Continental Hotel. Your Director of Sales has just given you the latest occupancy figures, and you want to analyze the numbers graphically to look for trends.

This chapter introduces you to the powerful data charting capabilities of ClarisImpact. After completing it, you will know how to:

- create a data chart model and format it with a model style
- import a spreadsheet to use for data in the chart
- use the flexible data charting model to depict your data in several different ways
- customize your chart using the ClarisImpact style bar

Beginning your work

Start ClarisImpact (if necessary) and create a new drawing document. (See "Creating a new document" on page 2-22 if you need help.)

- **Note** In this session and throughout the tutorial, you can follow the examples or use the text as a guide to work on your own documents.

Activate the graphics ruler by choosing **Show Graphic Ruler** from the View menu. You see rulers appear across the top and along the left side of your document window.

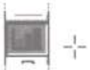
Creating your first data chart

The occupancy numbers are in an Excel spreadsheet which you need to import to gain access to the figures. Next, you plot the figures in a data chart to examine the figures graphically. It is often easier to spot trends and comprehend figures when they are presented in a data chart rather than as a table of numbers. But first, you need to create a data chart to hold the numbers in the imported spreadsheet.

- **Note** You can also import data for a data chart from a variety of spreadsheet programs, including Claris Resolve, and Excel (3.0 or earlier). See chapter 7, "Making data charts," in the *User's Guide* for more information.

Plotting the chart

You can create 12 different types of data charts with ClarisImpact—from a simple bar chart to a stacked pictogram. After examining the data, you decide to plot a pie chart first. A pie chart will show what proportion of the total available rooms was occupied each quarter by guests in the three categories—corporate, tourist, and group:



Data chart tool with crosshair

1. **Click the data chart model tool and move your pointer into the drawing area.**

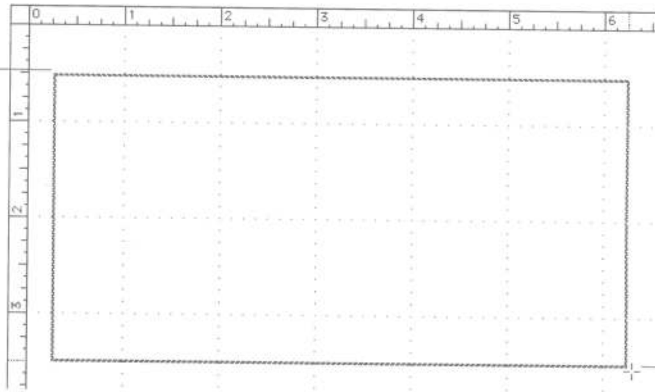
   Your pointer becomes a crosshair.

2. **Position the crosshair in the upper-left corner of the drawing area at about 1/2 inch from the top border and 1/4 inch from the left border.**

   Use the graphics grid and rulers to help you.

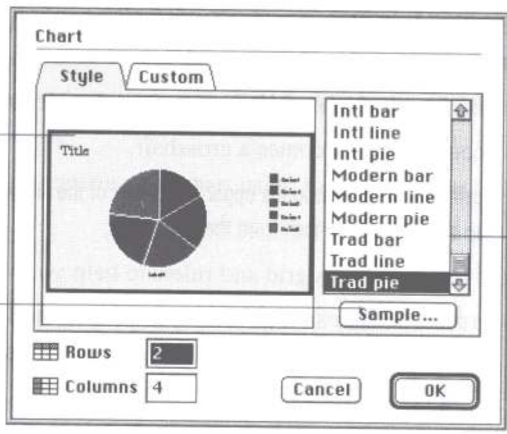
3. **To define the dimensions of the chart, drag down to the 3-1/2-inch mark on the vertical ruler and to the right to the 6-1/4-inch mark on the horizontal ruler.**

As you drag, you see an outline showing you where the model frame will be created. Release the mouse when you have a frame 6 inches wide by 3 inches high.



When you release the mouse button, you see the Data Chart dialog box appear with the **Style** tab selected.

- **Note** If no model styles appear in the list box, ClarisImpact cannot find the model style files. Unless you have set new preferences, ClarisImpact expects these files to be stored in a folder named ClarisImpact Color Styles or ClarisImpact B&W Styles inside the ClarisImpact Folder. If you didn't install these files, see "Doing a custom installation" on page 1-9 for help.



You see a list of data chart model styles in the list box on the right with predesigned model styles for bar, line, and pie charts for each of the style families included with ClarisImpact. As discussed in "Models and model styles" on page 2-7, using a model style to format your data chart is an easy way to achieve professional-looking results.

4. **Select the Trad pie style from the list.**

   Use the Traditional style to be consistent with the other models you've created in the tutorial.

   You can see a small preview of each chart style by selecting its name in the list box. Click **Sample** to see a larger version.

5. **Enter `3` for the number of data rows in the Row box and `4` in the Column box.**

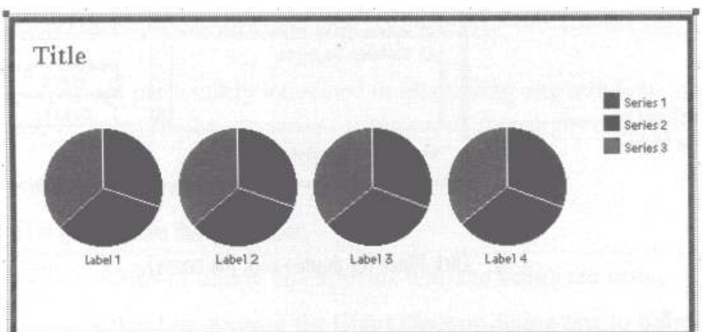
   You know that these are the dimensions of the spreadsheet.

6. **Click OK to accept the settings.**

   ClarisImpact creates a pie chart with the formatting settings from the Traditional pie chart model style. You also see a data table with sample numbers under the data chart frame. You import the occupancy spreadsheet into this table.

   The cell containing the title is too small for the text. You could manually enlarge the cell, but you don't need to because you will be working in and viewing only the chart. (See chapter 6, "Making tables," in the *User's Guide* for details.)

Data table with sample numbers



Title	Label 1	Label 2	Label 3	Label 4
Series 1	10	11	12	13
Series 2	11	12	13	14
Series 3	12	13	14	15

- **Note** ClarisImpact includes model styles for three basic types of data charts: bar, line, and pie charts. Although the program can create 12 different types of charts, all the others are variations of these three basic types. For more information, refer to chapter 7, "Making data charts," in the *User's Guide*.

Importing the numbers

You are now ready to import the occupancy figures into the data table attached to the pie chart.

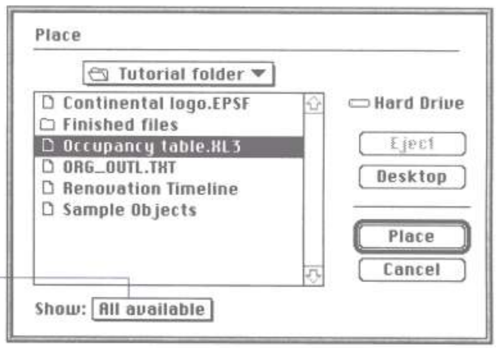
1. **Click the upper-left cell of the data table to select it.**

   It may already be selected. The chart frame has double-dotted lines around it and a heavy outline around the selected cell when it is active. (For help in selecting and activating models, see "Working with models and objects" on page 2-8.)

2. **Choose Place File from the File menu.**

   You see the Place document dialog box with a list of document names.

3. **Select the document Occupancy table.XL3.**



All available should be selected in the filters pop-up menu

4. **Click Place (or double-click the name).**

You briefly see the translation progress indicator and then the spreadsheet is inserted into the table.

n Occup	Qtr 1	Qtr 2	Qtr 3	Qtr 4
Corporate	138	227	400	51
Tourist	259	342	376	139
Group	267	310	325	174

Each column of the table (**Qtr 1**, **Qtr 2**, and so on) represents a *division* in the chart—or an individual pie; each row (**Corporate**, **Tourist**, and **Business**) represents a *series*—or similarly colored pie slices within each whole pie.

Table control

5. **You don't need the data table visible, so click the table control to hide it.**

   The figures are still there, they are just out of the way. To show the table, click this control again.

Customizing the data chart

ClarisImpact creates the data chart using the formatting settings from the selected model style. However, you can modify any of these settings at any time.

- **Note** You can experiment with any of these formatting options as much as you like. However, if you want your chart to look like the illustrations in this tutorial, you should follow the steps exactly.

Because you are particularly interested in identifying any trends in the occupancy figures for the corporate category, you format the chart accordingly.

To specify design options for the pie chart:

1. **Choose Gallery from the Chart menu.**

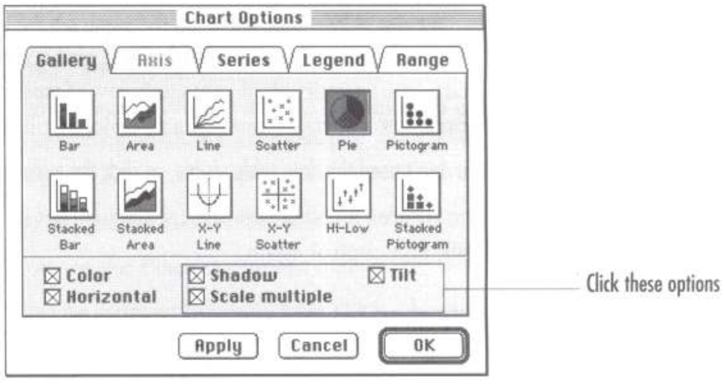
   The Chart Options dialog box appears with the **Gallery** tab active.

   Another method of opening the Chart Options dialog box to **Gallery** is to double-click an empty area of the chart frame (not containing text or part of the chart). If you double-click text or part of the chart, the Chart Options dialog box displays the appropriate set of options for that data chart element instead of **Gallery**.

You use **Gallery** to change the chart to any of the types shown. Once you choose the chart type, you can select a variety of design options specific to that type from the checkboxes at the bottom of the dialog box.

2. **The Pie chart type is already selected because it is one of the formatting options stored in the Traditional pie model style you chose earlier. Click the Shadow, Scale multiple, and Tilt checkboxes from the Gallery options.**

   Note that **Color** and **Horizontal** are already selected.



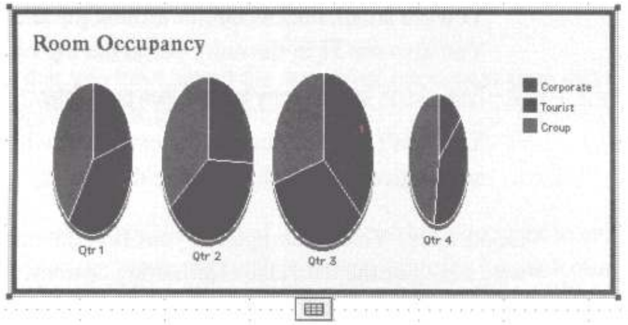
   Normally, the pies in a multiple pie chart are the same size. **Scale multiple** creates pies of different sizes that represent the actual magnitude of the numbers plotted. **Tilt** enlarges the pies a bit and draws them at an angle.

   Notice the other options at the top of the dialog box. Later in this session, you will click on these "tabs" to view and set different options for your chart.

3. **Click OK to accept the settings and close the dialog box.**

   You can use the **Apply** button to see the results of your choices in the chart without closing the dialog box.

You see the pie chart formatted with your custom settings.



To draw attention to the corporate figures in your chart, you can "explode" the slice representing the corporate series:

1. **With the chart still selected, position the crossbar pointer over one of the pie slices representing the corporate series.**

   Use the chart legend to help you decide which slice is part of the Corporate series.

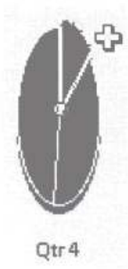
2. **Option-click the pie slice.**

   The chart redraws so that the pies are smaller, and the corporate slice separates slightly from the rest of each pie.

Correcting an error

Examining your work, you discover a possible error in the numbers: the pie slice for the corporate category in the fourth quarter seems too small.

Correcting a value in the pie chart is easy using the in-chart editing capabilities of ClarisImpact. You don't need to show the data table again; just click the data chart element that is incorrect. Once you've done this and checked your printed report, you realize the mistake: 51 was entered instead of 351.



To correct the numerical error in the chart:

1. **Click the slice of the fourth quarter pie corresponding to the corporate category.**

   You see small, hollow circles around the slice indicating that it is selected. You also see **51** in the entry bar at the top of the document window.

2. **Type** `351` **into the entry bar and then press Enter.**

   You don't need to click in the entry bar; whatever you type will automatically replace the value there.

Good work! You've completed your first data chart and familiarized yourself with many of the data chart formatting options. Next, you'll create a different type of chart that incorporates projected figures.

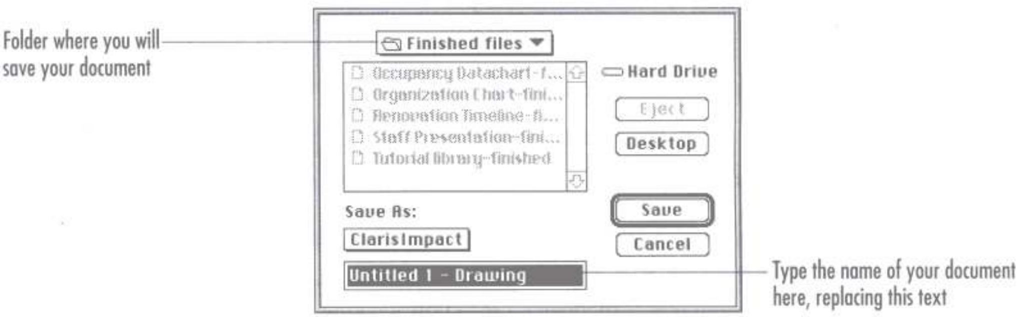
Saving your work

Now is a good time to save your work:

1. **Because you are saving the document for the first time, choose Save As from the File menu.**

   You see the Save As dialog box.

2. **Navigate to the Tutorial folder, if you need to, and double-click the Finished files folder to make it current.**



3. **Type** `Occupancy Datachart`**, replacing Untitled 1 – Drawing.**

   The number you see after **Untitled** may be different. ClarisImpact keeps track of how many documents you've opened since you started and puts that number here.

4. Click **Save**.

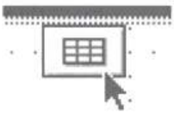
   The document is saved on your disk and remains open for you to continue working on.

Now that you have saved the document once, next time just choose **Save** from the File menu, or press Command-S.

Creating another data chart

The pie chart you've created looks great, but you want to create a chart that highlights the projected total occupancy figures for each quarter. Use a *combination* chart that incorporates a *stacked bar* chart plotting the actual numbers with a *line* chart showing the projected numbers.

Adding the projected numbers



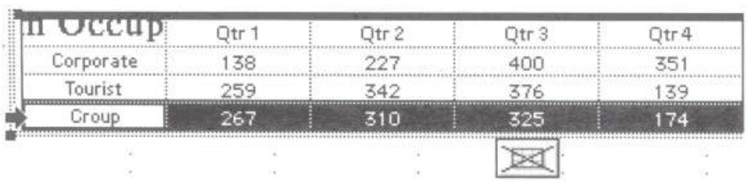
First, you need to expand the data table attached to your chart and enter the projected occupancy figures:

1. **Make sure the chart is selected and then click the table control at the bottom of the chart frame.**

   The hidden data table reappears.

2. **Select the bottom row of data in the table (the Group series) by positioning your pointer over the left border of that table row and clicking.**

   The pointer should look like a heavy, rightward-pointing arrow. After you click, the row is highlighted.



n Occup	Qtr 1	Qtr 2	Qtr 3	Qtr 4
Corporate	138	227	400	351
Tourist	259	342	376	139
Group	267	310	325	174

Click here to select the entire row

Insert cell control

3. **Click the insert cells control in the data chart model bar to add a row to your data table.**

   You can also choose **Insert Cells** from the Chart menu.

ClarisImpact creates a new row of cells below the selected row and copies the values from the selected row into it.

4. **Now, enter the projected occupancy figures. Type `Projected` into the first cell, replacing Group. Press Tab to confirm your entry and move to the next cell. Enter the rest of the values as follows:**

For	Enter
Qtr 1	`600`
Qtr 2	`700`
Qtr 3	`900`
Qtr 4	`850`

As you enter these values, notice that the pie chart updates accordingly. You will change the chart to a more appropriate chart type in a moment.

5. **You no longer need the data table, so hide it by clicking the table control.**

Creating a combination chart

To create a more appropriate type of chart from the existing pie chart:

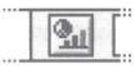
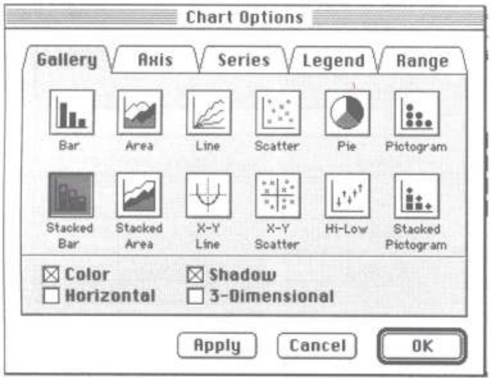


Chart options control

1. **Make sure the chart is still selected and then click the chart options control in the model bar.**

   The Chart Options dialog box appears when you click this control, choose **Gallery** from the Chart menu, or double-click the chart. If the Gallery options are not displayed, click **Gallery** at the top of the dialog box.

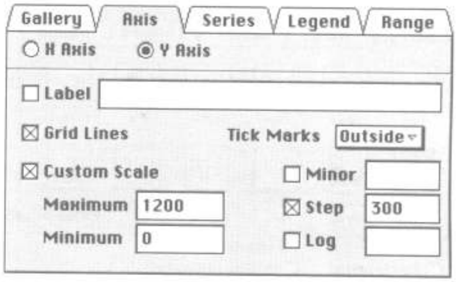
2. Select the **Stacked Bar** chart type and deselect the **Horizontal** checkbox. Leave **Shadow** and **Color** selected.



3. Click the **Apply** button to see the effects of the formatting changes you have made without closing the dialog box.

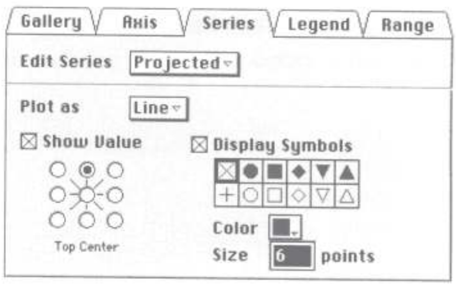
   Clicking **OK** would close the dialog box before you have finished with it. If necessary, move the dialog box to a corner of the screen so that you can see the effects on the pie chart. (You can drag it down to the point where just the title bar is visible and use the keyboard shortcut Command-A to apply the settings.)

4. Next, click the **Axis** tab at the top of the dialog box. Make sure **Y Axis** is selected and then click **Custom Scale**. For **Maximum**, replace the value with `1200`. Then click **Step** and type `300`. Click **Apply** if you like.



Because you are going to change the projected series to a line, it is no longer summed along with the other series as a stacked bar. Therefore, you changed the predefined maximum value to a number more appropriate to your combination chart.

5. Finally, click **Series**. Select **Projected** from the Edit Series pop-up menu and **Line** from the Plot as pop-up menu. Click **Show Value** and choose the top center position. Click **Apply** if you like.

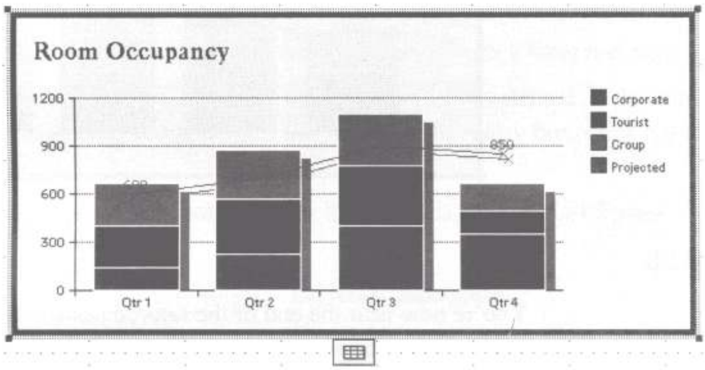


Changing the Projected series so that it is plotted as a line creates a combination chart. The other data series in your chart continue to be plotted as stacked bars.

This chart structure emphasizes that the projected numbers are different from the actual numbers (the Corporate, Tourist, and Group series) plotted in the chart.

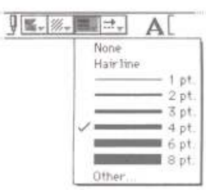
6. **The Legend and Range settings are fine as they are.**
7. **Click OK to accept the settings and close the dialog box.**

   You see the combination chart formatted with your custom settings.



As a finishing touch, widen the line representing the Projected series and enlarge the displayed values to a larger font size.

Click here to select the Projected series



Pen width menu

Use the ClarisImpact style bar to change the line width.

1. **Select the Projected series by clicking the color square next to the words Projected in the legend. (Click twice if you have deselected the chart.)**

   A small hollow selection circle appears in the color square.

2. **Choose 4 pt. from the pen width pop-up menu in the style bar at the top of the document window.**

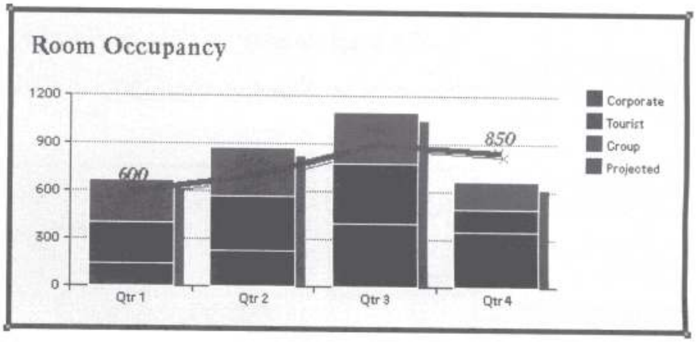
   You see the line plotting the projected occupancy figures widen to four points. (There are 72 points in an inch.)

3. **With the Projected series still selected, choose Font from the Text menu and then choose ZapfHumnst Bdlt BT. (Use this font to match the Traditional model style you used to format the rest of the chart.)**
4. **Choose Size from the Text menu and then choose 14 Point.**

   You see the values enlarge in the chart.

5. **Click outside the chart frame in a blank area of the drawing area.**

   Good job! Your completed data chart should look something like this:



Finishing up

You're now near the end of the tutorial session on data charts. In chapter 6, you'll put all the models you've created during the tutorial sessions into a ClarisImpact slide show. But first, you need to store your data chart in the Tutorial library and then save and close the Occupancy Datachart drawing.

Storing the chart in a library

Store your data chart model in the Tutorial library the same way you did the timeline chart in the last chapter:

Library control

1. **Click the library control in the upper-right corner of the document window (or choose Open Library from the File menu).**

   You see the Open Library dialog box.

2. **Navigate to the Tutorial folder (if necessary) and select Tutorial Library.**
3. **Click Open (or double-click the name).**

   You see the tutorial library palette appear.

4. **With the data chart selected in your document window, click Add at the bottom of the library palette.**

   Make sure the chart is selected but not activated. You see selection handles at each corner.

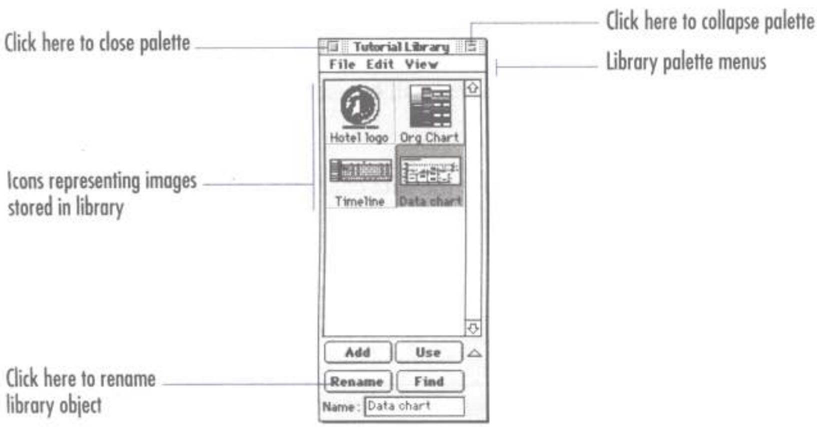
   You see the icon for the chart appear in the library palette. It should be named **Object 4**.

5. **If the library options are not visible, click the triangle near the bottom of the palette to see them.**

   You see the **Rename** and **Find** buttons, along with a **Name** text box.

   The icon for the timeline chart should still be selected. If the icon is not highlighted and you don't see **Object 4** in the entry box, click the icon to select it.

6. **Select the text in the box and replace it with `Data Chart`. Click Rename.**



7. **Click the close box in the upper-left corner of the library palette. Click Yes in the dialog box that appears prompting you to save.**

By placing the timeline chart in a library, you have made it available anytime you need it. You will use this library in chapter 6, "Putting it all together in a presentation."

Closing the drawing

To save and close the document:

1. Choose **Save** from the File menu.
2. Choose **Close** from the File menu or click the close box at the top left corner of the document window.

   The document window closes, leaving ClarisImpact running with no documents open.

If you want to take a break, quit ClarisImpact by choosing **Quit** from the File menu. Or you can continue with chapter 6, "Putting it all together in a presentation."

Where to go from here

In this chapter, you have used the powerful data charting tool in ClarisImpact to create different graphic representations from a table of numbers. You have created and formatted a pie chart and a combination chart; there are ten more types of charts and a variety of different formatting options still to explore.

You have also learned some skills that will be useful in working with the table model tool.

For more information on how to use the data chart tool or other topics covered in this chapter, refer to the *User's Guide*.

For information on	See this section in the *User's Guide*
Changing the zoom magnification	"Getting a closer look at your document" in chapter 2
Models, model elements, and model styles	Chapter 3, "Understanding models and styles"
Working with data charts	Chapter 7, "Making data charts"
Building your own data chart model style	"Creating, deleting, or renaming data chart model styles" in chapter 7
Changing an element's fill or pen settings with the style bar	"Changing the color or pattern of a series" in chapter 7 and "Filling an object" and "Changing an object's pen settings" in chapter 12
Changing the chart layout and design options	"Restructuring data charts" in chapter 7

For information on	See this section in the *User's Guide*
The different types of charts available in ClarisImpact	"Types of charts" and "Choosing chart types and options" in chapter 7
Editing the data table	"Entering and editing chart information" in chapter 7 and "Entering and editing table data" in chapter 6
Formatting the data table	"Working with the data table" in chapter 7 and "Formatting data in cells" and "Changing rows and columns" in chapter 6
Formatting text in a data chart	"Formatting chart text" in chapter 7 and "Changing the appearance of text" in chapter 13
Importing spreadsheet files from other programs	"Importing data" in chapter 7 and "Importing, placing, and exporting documents" in chapter 2
Using in-chart editing to enter chart data	"Entering and editing chart information" in chapter 7
Using libraries to store objects	"Working with library objects" in chapter 12

Chapter 6

Putting it all together in a presentation

Chapter 6

Putting it all together in a presentation

Imagine that you are the General Manager of the Continental Hotel. You usually have your assistant prepare a presentation for your executive staff meeting. But he's busy, so you decide to create the presentation with ClarisImpact yourself.

In this chapter, you learn how easy it is to create a professional-quality onscreen presentation. After completing it, you will know how to:

- create an onscreen presentation, or slide show, using a predefined master slide style
- build your presentation using charts stored in the Tutorial library
- use the Slide Manager to control various aspects of your presentation
- edit the master slide to include the Continental Hotel logo
- Set up custom viewing options for your slide show and then view it on your Macintosh screen

Beginning your work

To begin, you need to open a new ClarisImpact presentation document. A presentation document is different from the drawing documents you have used earlier in this tutorial. In a presentation document, you work on *slides* instead of pages, and you use a *master slide* to format a background that repeats on each slide to unify your presentation.

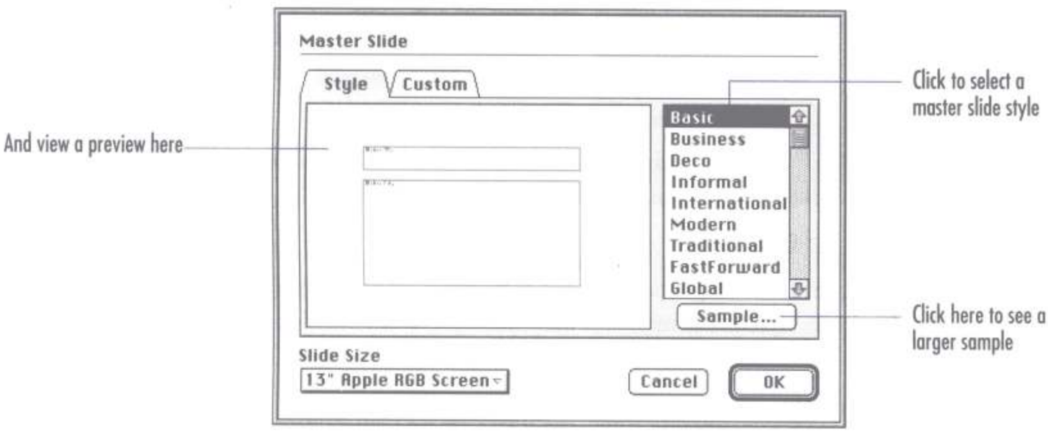
You also have the option of creating a presentation to be viewed on your computer monitor (a *slide show*), or one to be printed on overhead transparencies or imaged to photographic slides.

Within the presentation document, you can create and edit any of the program's intelligent models, as well as use its drawing and text creation capabilities.

Opening a new presentation document

Start ClarisImpact (if necessary) and create a new presentation document. (If you need help, see "Creating a new document" on page 2-22 for details.)

When you open a presentation document, you see the Master Slide dialog box first. A list of installed master slide styles is on the right.



◆ **Important** If you have a large-format monitor (bigger than 14 inches), the Slide Size pop-up menu defaults to **Custom** and you do not see any master slide styles. Choose **13" Apple RGB Screen** from the Slide Size pop-up menu to continue.

◆ **Note** If no master slide styles appear in the list box, ClarisImpact cannot find the master slide style files. Unless you have set new preferences, ClarisImpact expects these files to be stored in a folder named ClarisImpact Color Styles or ClarisImpact B&W Styles inside the ClarisImpact Folder. If you didn't install these files, see "Doing a custom installation" on page 1-9 for help.

Master slide styles are very similar to the model styles you have worked with in earlier tutorial sessions. Instead of storing settings for a model, master slide styles hold formatting options for a master slide, including information about the slide background, fonts and other text formatting, and the size or *output medium* of the presentation. Chapter 14, "Making presentations," in the *User's Guide* covers working with presentations in detail.

ClarisImpact comes with five predefined *families* of styles. As discussed in "Models and model styles" on page 2-7, these style families help you create attractive, professional-looking documents with a consistent look. Because you know that the hotel uses the Traditional style family, you choose it to format your new presentation.

To apply the Traditional master slide style:

1. Choose **13" Apple RGB Screen** from the Slide Size pop-up menu if it is not already selected.

   You know that you will be using a computer with a 13-inch monitor attached to a video projection system when you present your slide show later.

2. Select **Traditional** from the list.

   You see a small image of the style in the preview area to the left. To see a larger version, click **Sample**.

3. Click **OK**.

   ClarisImpact applies the formatting settings from the selected master slide style to the master slide of your presentation. You see the first slide of your document ready for input.

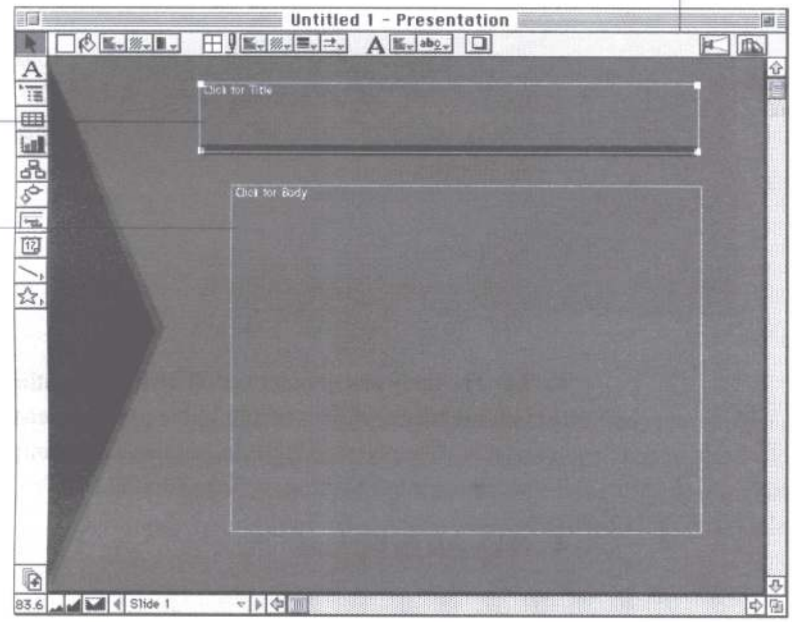
Creating the first slide

You are ready to begin entering the information you want to present. But first, take a moment to examine the document window, which should look something like this (depending on your system configuration). You may need to scroll or use the **Fit To Window** command on the View menu to see all of the document.

Once you have completed your presentation, click here to start an onscreen slide show

Title placeholder (with selection handles)

Body placeholder



The graphic elements and colored background were applied to the master slide in your document through the Traditional master slide style. You will work with the master slide later in this session.

Notice the two special text frames, the title and body placeholders. They help you consistently place and format text on each slide.

Entering your agenda on the first slide

You start your presentation with the agenda for your meeting. To begin entering text:

1. **The title placeholder (the frame at the top of the slide labeled Click for Title) should be selected. If you don't see selection handles around it, click to select it.**
2. **Type** `Agenda`.

Title placeholder with text

   As soon as you begin to type, the frame highlights and you see the blinking text insertion point in the frame. You also see a double-dotted border around the frame and your pointer becomes an I-beam.

   The text is formatted according to the Traditional master slide style you applied earlier.

3. **Press Option-Return to move your pointer to the body placeholder and type the following, pressing Return after each line:**

```
Welcome!
Announce staff changes
Update on lobby renovation
Review occupancy trends
```

◆ **Tip** The body placeholder is a ClarisImpact outline model. You can use the Outline menu while working in the placeholder to expand and collapse headings, apply a model style, or otherwise manipulate the text. For details, see chapter 9, "Making outlines," in the *User's Guide*.

4. **Click outside the text frame.**

You see the gray background from the master slide return. Your slide should look something like this:

◆ **Note** To move easily from the title placeholder to the body placeholder on the slide, you can press Option-Return. If you are editing the body placeholder (or if you've deleted the body placeholder and are editing the title placeholder), ClarisImpact inserts a new slide after the one you're working on and selects its title placeholder so it's ready for text entry.

Building the rest of the presentation

Now you are ready to build the framework for the rest of your presentation.

Add slide control

◆ Click the add slide control in the bottom-left corner of the document window to add a new slide.

You see a blank, formatted slide in the document window.

Notice that the slide indicator, at the bottom of the window, now reads **Slide 2**. You can use the arrows at either end of the slide indicator to navigate to the next or previous slide. (Because slide two is the last slide in the document, the next slide arrow is dimmed.)

Click here to back up to the previous slide

Click here to advance to the next slide

Click the slide indicator to access the navigation pop-up menu

Using the Slide Manager to add more slides

When you click the slide indicator, a navigation menu pops up, allowing you access to the slides in your presentation as well as the master slide and the Slide Manager. You use the Slide Manager to rename, reorder, and control how the slides in your presentation are shown, as well as to create and delete slides.

Slide indicator with pop-up menu

Use the pop-up menu to access the Slide Manager now.

1. **Click the slide indicator and choose Slide Manager from the navigation pop-up menu.**

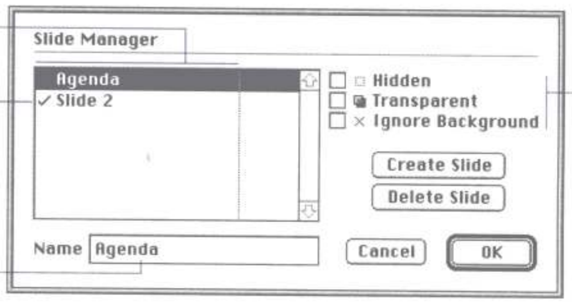
   You see the Slide Manager dialog box with a list of slides in your presentation. The active slide, slide two, is marked with a checkmark. On the right side of the slide list is a status area showing what viewing options are in effect for each slide.

2. **Slide 1 should be highlighted; if it isn't, select it in the slide list. Type** `Agenda`.

Slide list

The slide currently on your screen is indicated by a checkmark

Type a new slide name here and see it in the slide list above



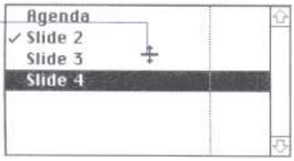
Options to control how the slides in your presentation are shown

What you type replaces **Slide 1** in the slide list. You can rename slides to more easily keep track of their contents in your document.

3. **Click the Create Slide button twice to add two slides to your presentation.**

   Using the **Create Slide** button is the same as using the add slide control while working in your document. You see two new slides, labeled **Slide 3** and **Slide 4**, appear in the slide list.

Double-arrow pointer used to resequence slides



4. **Notice the checkboxes for controlling how the slides in your presentation are shown and the double-arrow pointer used to resequence slides.**

   You can use these options to hide certain slides in your presentation (the **Hidden** option), to show a progression of steps across a number of slides (the **Transparent** option), or to ignore the background elements on the master slide to create, for example, a title slide (the **Ignore Background** option). You won't use these options here, but they are explained in detail in chapter 14, "Making presentations," in the *User's Guide*.

   You can also use the Slide Manager to resequence slides. When you position your pointer over a slide name in the slide list, it becomes a double-arrow pointer, indicating that you can drag a slide to a new position in the presentation. Dragging up makes the slide appear earlier in the presentation, dragging down makes it appear later.

5. **Click OK to close the Slide Manager dialog box.**

   Unless you changed the active slide above, you still see slide two on your screen. By checking the navigation pop-up menu, you see the new slide name and the new slides you created.

Good work! You've now finished creating the framework for your presentation. Now you just need to add titles to the slides and bring in the graphics stored in your electronic library.

Saving your work

1. **Because you are saving the document for the first time, choose Save As from the File menu.**

   You see the Save As dialog box.

2. **Navigate to the Tutorial folder, if you need to, and double-click the Finished files folder to make it current.**

3. **Type `Staff Presentation`, replacing Untitled 1 – Presentation.**

   The number you see after **Untitled** may be different.

4. **Click Save.**

   The document is saved on your disk and remains open.

Using the library to bring in graphics

As you know from the previous tutorial sessions, you can store graphics in a ClarisImpact library for easy access. You now use the library to access the models that you've built earlier in this tutorial and stored in the Tutorial library. You'll use the organization chart that you updated in chapter 3 on slide two, the lobby renovation timeline you finished in chapter 4 on slide three, and the second data chart you created in chapter 5 on slide four.

◆ **Note** Don't worry if you haven't completed the exercises in the earlier chapters. There are versions of the completed documents in the Finished files folder within the Tutorial folder that you can use.

Activate the graphics ruler by choosing **Show Graphic Ruler** from the View menu. Rulers appear across the top and along the left side of your document window.

First, enter the title for slide two:

1. **If you don't see Slide 2 in the slide indicator at the bottom of the document window, use the navigation controls to make slide two current.**

2. **If it's not already selected, click the title placeholder so it's ready for entry.**

   You see selection handles at each corner of the placeholder.

3. **Type `Staff Changes` into the text frame.**

4. **Because you will be using a chart that you've already created on this slide, you don't need the body placeholder. Delete it by selecting it and choosing Clear from the Edit menu or pressing Delete.**

If you see the blinking text insertion point when you try to select the text frame, deactivate it by pressing Enter. Now you can delete the frame.

Next, to access the Tutorial library and retrieve a copy of the chart to use on slide two:

Library control

1. **Click the library control in the upper-right corner of the document window.**

   You see the Open Library dialog box with a list of document names.

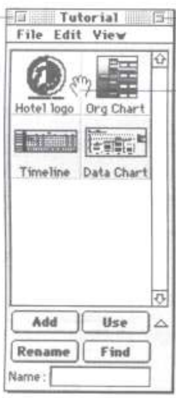
2. **Navigate to the Tutorial folder (if necessary) and select the document Tutorial library.**

3. **Click Open (or double-click the name).**

   You see the tutorial library palette appear. As you learned earlier, you can still work in the document window while the tutorial library palette is open.

Click here to close palette

Icons representing images stored in library



Click here to collapse palette

Use this pointer to select icons in the library and to drag images out of the library and into your document

4. **Click the organization chart icon (titled Org Chart) to select it.**

   When you select the icon, it is highlighted and your pointer becomes a grabbing hand.

5. **Drag the icon out of the library and release the mouse, dropping the image into your drawing.**

   As you drag the icon out of the library palette, you see the outline of the chart. Using this outline and the graphics rulers as guides, drop the chart at about 1-1/8 inches from the top and about 1-1/4 inches from the left of the slide borders. (Don't worry if the organization chart is too big for the slide; you'll resize it in a moment.)

6. **If you have a smaller monitor, you can collapse the palette to get it out of your way by clicking the box in the upper-right corner of the palette.**

Notice that you haven't just pasted or imported an uneditable graphic into your presentation, as you would have if you were using another program to create the organization chart; it is fully editable.

You need to resize the chart so it fits better on your slide:

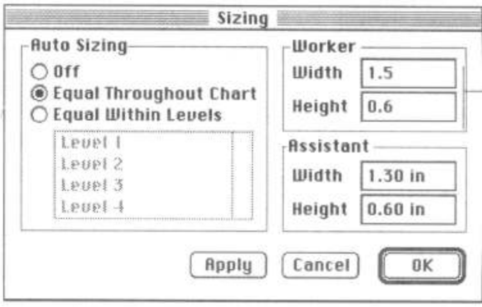
1. **The model should still be selected, so select any position box by clicking it.**

   You see the add element controls and the double-dotted border around the model frame.

2. **Choose Sizing from the OrgChart menu.**

   The **Sizing** dialog box appears.

3. **Make sure Equal Throughout Chart is selected and then, for Worker boxes, type `1.5` for the Width and `0.6` for the Height.**



Type these values for the dimensions of the worker position boxes

4. **Click OK.**

   All the position boxes resize and the chart frame shrinks accordingly.

Selection handle

Chart selected but not active

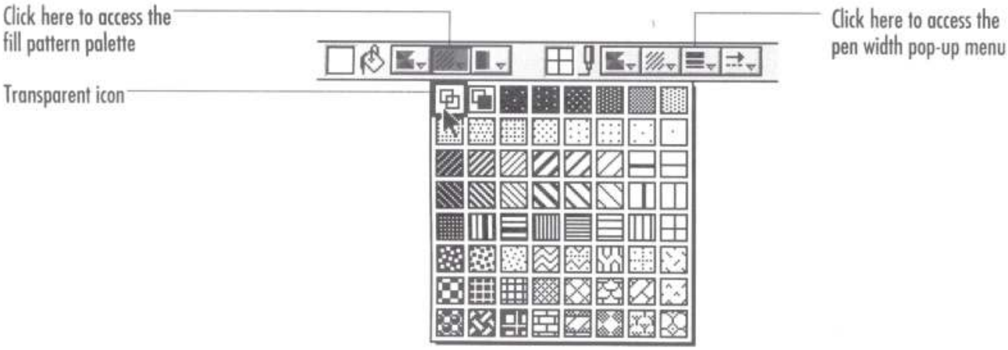
Finally, change the background fill of the chart, eliminate the border line, and reposition it so it fits better on your slide.

1. **Make sure the chart is selected but not active.**

   If you have deselected the chart (you see no selection handles at each corner), click it once. If you see the double-dotted border indicating the chart is selected and active, press Enter. You see the gradient fill of the chart and selection handles.

2. **Click the pattern control in the style bar to open the fill pattern palette, and select the transparent icon.**

   The organization chart's gradient fill background disappears and you see the gray slide background behind the chart.



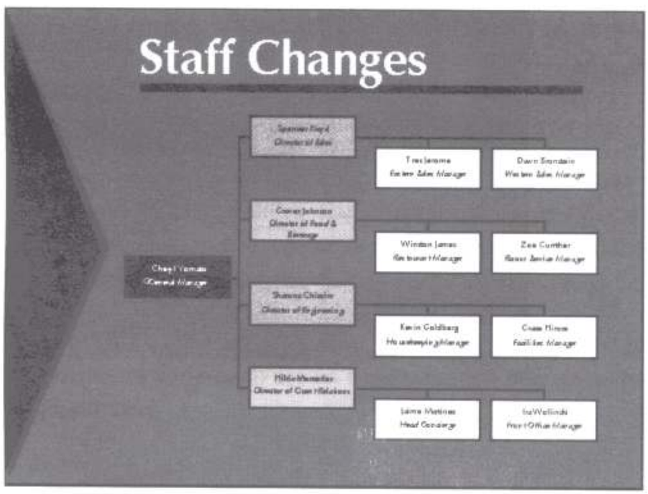
3. **Next, choose None from the pen width pop-up menu.**

   The colored border around the model frame disappears.

4. **Now, drag the model up and to the right into the area under the slide title.**

   Position the frame so that its top border is directly beneath the decorative bar under the title.

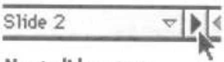
You have completed the second slide in your presentation.



Completing slides three and four

Use the same technique you used in the section above to bring in the completed charts from the Tutorial library for slides three and four.

To build slide three:



Next slide arrow

1. **Click the next slide arrow beside the slide indicator at the bottom of the document window.**

   You see slide three, blank but formatted, on your screen.

2. **Click the title placeholder and type** `Lobby Renovation`.
3. **Delete the body placeholder by selecting it and pressing Delete.**

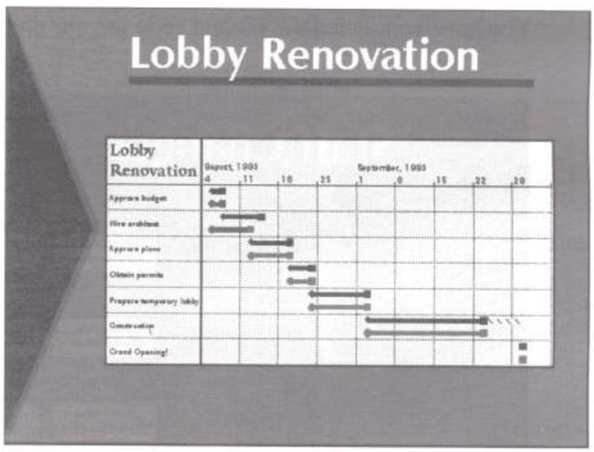
Click here to expand palette

4. **If you have left the tutorial library palette open but collapsed, expand it by clicking the box at the right end of the title bar.**
5. **Select the timeline chart you created in chapter 4 (titled Timeline) by clicking its icon.**
6. **Drag the icon out of the library and drop it into your drawing.**

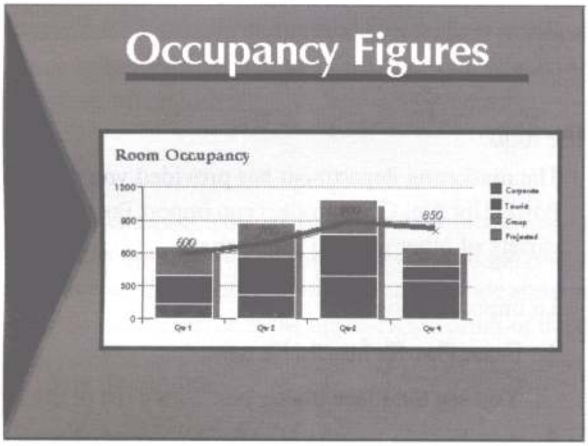
   As you drag the icon out of the tutorial library palette, you see the outline of the chart. Using the outline as a guide, drop the chart at about 2 inches from the top and about 1-1/2 inches from the left.

7. **Collapse the tutorial library palette again, if you wish.**

   Slide three should look something like this:



Build slide four in the same way. Title it `Occupancy Figures` and then delete the body placeholder. Use the data chart you created and stored in the Tutorial library (titled **Data Chart**) in chapter 5. Refer to the previous section starting on page 6-14 if you need help, and use the following illustration as a guide:



Good work! You've completed all four slides you planned. Before you proceed, close the Tutorial library and save your work.

Adding a graphic to the master slide

You decide to use the Continental Hotel logo on your slides to give them an official look. The logo is stored in the Tutorial folder as a separate file.

Editing the master slide

As mentioned previously, you use the master slide to create a unified background for all the slides in your presentation. It's like a "layer" of text or graphic information that repeats on every slide. You want the logo to appear as part of the background on each slide, so place it on the master slide.

- To edit the master slide, click the slide indicator at the bottom of the document window to access the navigation pop-up menu, and select **Master Slide**.

You can also access the master slide by choosing **Edit Master Slide** from the View menu.

You see the master slide on your screen. This is where you modify any of the formatting settings that make up the master slide style, including background color, font and other text settings, the level settings for the outline model in the body placeholder, and so on.

Because the master slide style you used gives just the effect you want, all you need to do is add the Continental Hotel logo.

Importing the logo

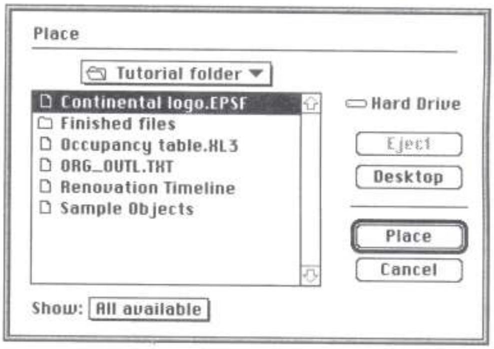
The marketing department has provided you with the logo as an encapsulated PostScript file. ClarisImpact can import PostScript, or EPSF, files as well as a variety of other graphic file formats.

To import the logo:

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

   You see the Place dialog box with a list of document names.

2. **Navigate to the Tutorial folder (if necessary) and select the document Continental logo.EPSF.**



3. **Click Place (or double-click the name).**

   You briefly see the translation progress indicator and then the logo appears on the master slide.

4. **Drag the logo to the upper-right corner of the master slide, to the right of the master title placeholder and above the decorative horizontal bar.**

   It is already sized appropriately.

5. **Use the navigation pop-up menu to switch back to view the slides in your presentation.**

   Notice that the logo appears on all the slides.

Congratulations! You've finished entering the information for your presentation. Now all that's left to do is set up the slide show options to show it on your Macintosh.

Setting up the show

With ClarisImpact, you can set up a custom combination of special effects—or slide show options—to view the presentation on your computer screen. Once you have set these options, you can start a slide show with one click by using the slide show control in the upper-right corner of the document window.

Using the Slide Show dialog box

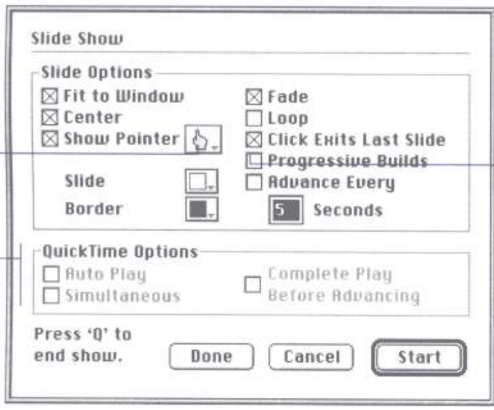
To set the slide show options:

1. **Choose Slide Show from the View menu.**

   You see the Slide Show dialog box.

Pointer pop-up menu

QuickTime options are only available if the QuickTime system extension is installed

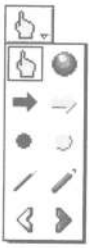


Progressive Builds option (click to activate)

(For a detailed discussion of each of these options, see chapter 14, "Making presentations," in the *User's Guide*.)

2. Click **Progressive Builds** to activate that option.

   The Progressive Builds option causes each bullet in the body placeholder to appear in succession as you advance the slide show, each one "building" on the previous bullet. This will be effective when showing the outline you created for your agenda on slide one.



Pointer pop-up menu

3. Click the pointer pop-up menu next to the **Show Pointer** option and notice the variety of onscreen pointers available to you.

   Pick a different pointer if you wish. You can call attention to areas on the slide during your slide show by moving the special pointer with the mouse.

4. You have finished setting the options, so click **Done** to save the options and close the dialog box.

   Start begins the slide show, but you're not ready to view your presentation yet.

Viewing your presentation onscreen

You've done all the work, now sit back and enjoy a screening of your slide show.

Lights, camera, action!

To start the slide show with the options you just selected in the Slide Show dialog box:

1. Use the slide navigation pop-up menu to switch back to the first slide, if you haven't already.

Slide show control

2. Click the slide show control, located in the upper right of the document window on the style bar.

   Your slide show begins. You see slide one's title, **Agenda**, and the first bullet point. Because you selected the Progressive Builds option, you see only the first bullet in your slide. Notice the custom pointer you chose in the Slide Show dialog box.

3. Click the mouse button to advance the show.

   You see the next bullet on slide one.

4. **Continue to advance the show by clicking the mouse button.**

   You can also advance the show from the keyboard by pressing Return, Tab, or the Space bar. Actually, there are a number of keys, including the Left and Right arrow keys, that you can use to run a slide show manually. Refer to chapter 14 of the *User's Guide*, or the *Quick Reference* for a complete table.

5. **When you reach the end of the presentation, clicking the mouse returns you to the presentation document.**

   Press Q or Command-period to exit the slide show at any time during the show. Using the Slide Show options, you can configure the show to loop, or return to the first slide, when it reaches the end. By setting the auto advance option (**Advance Every *x* Seconds**) along with **Loop**, you can create a self-running presentation.

Finishing up

You're near the end of this session, the last in the tutorial. You need to save your document and, if you've finished, quit ClarisImpact.

Closing the presentation

To save and close the document:

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

   Saving the document also saves the slide show options that you selected earlier.

2. **Choose Close from the File menu or click the close box at the top-left corner of the document window.**

   The document window closes, leaving ClarisImpact running with no documents open.

If you want to take a break, you can quit ClarisImpact by choosing **Quit** from the File menu. Or you can get started now creating your own documents.

Where to go from here

In this tutorial, you have been introduced to ClarisImpact and three of its intelligent "models." You've learned how to use many of its smart features—features designed to make it easier for you to create professional-looking business graphics. And you've seen only a small portion of the power of ClarisImpact!

For more information on creating and editing presentations, the presentation document, or other topics covered in this chapter, use this table to help you find topics in the *User's Guide*.

For information on	**See this section in the *User's Guide***
Importing files from other programs	"Importing, placing, and exporting documents" in chapter 2
Resizing an organization chart	"Changing the position size" in chapter 4
Using libraries	"Working with library objects" in chapter 12
Creating a text-based report using your graphics	Chapter 13, "Working with text"
Working with ClarisImpact presentations	Chapter 14, "Making presentations"
Applying a master slide style	"Using master slide styles" in chapter 14
Creating overhead transparencies or 35-mm slides	"Producing your presentation" in chapter 14
Deciding on a slide size	"Choosing a medium for your output" in chapter 14
Formatting the master slide	"Using a master slide" in chapter 14
Printing handouts to complement your presentation	"Producing your presentation" in chapter 14
Setting up an onscreen slide show	"Viewing your presentation onscreen" in chapter 14
Using the Hidden, Transparent, or Ignore Background options	"Using the Slide Manager" in chapter 14
Working with the body placeholder outline	"Arranging topics in an outline" in chapter 9 and "Working with the title and body placeholders" in chapter 14

Z93606-008A