Mekko Graphics Help

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1.1 Welcome to Mekko Graphics

Mekko Graphics is a professional tool designed to produce powerful business charting capability in a simple package that works seamlessly with Microsoft PowerPoint™. Often, a single, clear visual can save hours and pages of detailed explanation. Mekko Graphics provides powerful features and flexibility that make outstanding, eye-catching charts more quickly and efficiently. You'll love how Mekko charts leverage your data and present it clearly and effectively.

Mekko Graphics is the result of years of development incorporating new features suggested by you, our users. We have redesigned Mekko Graphics from the ground up, enabling you to make more distinctive, eye catching charts in less time. You will immediately see the difference!

Whether you are a corporate strategist or management consultant with high-level, sophisticated charting needs, or just need to add more flexibility and features to your Microsoft PowerPoint™ charts, with Mekko Graphics, informative and eye-catching presentations will be the hallmark of your work.

For more information or support on Mekko Graphics, including sample presentations and FAQs, as well as free online tutorial videos, please visit www.mekkographics.com.

We are happy to hear from you! If you have any questions, please contact us at mekkographicssupport@insightsoftware.com or you may call us at 781-250-2001 and press option 3.

1.2 Basic Steps to Create a Chart

There are two basic methods of inserting a chart on a slide in PowerPoint:

1. Quick Launch Method

   Mekko Graphics uses the Quick Launch method for inserting charts on a slide.

   From Microsoft PowerPoint™, go to the Mekko Graphics menu, and choose from the eight drop down menus for your desired chart type.

(For more information on the chart types and subtypes, hovering your mouse over the chart type will display a brief description of the chart.)

You can use the Quick Launch method to automatically create any desired Mekko Graphics chart. To use the Quick Launch method, go to the Mekko Graphics tab and choose your desired chart type from the list of drop down menu options. Mekko Graphics will automatically launch and create your chart with pre-populated data, that you can then replace with your own data. The "dummy data" that populates the chart allows you to quickly see how the chart utilizes the data. If you wish to insert multiple or half page charts on a slide, you can utilize the **Insert Multiple Charts** option. Enter data in the spreadsheet.

2. Inserting a Chart from Microsoft Excel™

You can create charts in either PowerPoint or Excel directly from your Excel data via a Mekko Graphics Add-In in MS Excel.

Once you select a valid range in Excel, you can then choose a Mekko Graphics chart type from the **Insert Mekko Graphics Charts** section in the Mekko Graphics tab in Excel. You may insert the chart either in PowerPoint or Excel.

To insert the chart into PowerPoint, first click on the **Chart in PowerPoint** button, choose your chart type, then switch to an activated PowerPoint and choose an existing slide or create a new slide. When the mouse pointer is on a slide, the desired chart type will insert upon a single click of the mouse. This newly created chart will have a link to a range in Excel.

To insert the chart into Excel, first click on the **Chart in Excel** button, choose your chart type, and the chart will insert into Excel.

Once you have inserted the chart type either via Quick Launch or via the Excel Add-in, your bar labels are generally listed across the top of the spreadsheet, and series labels are listed down the spreadsheet. The first row is designated for Bar names and first column for Series names. The first cell (A1) should be empty.

To enter or edit data into the spreadsheet, you may do any one of the following:

1. Enter data directly as you would in Excel

2. Copy and paste from an existing Excel spreadsheet

3. If there is a link to a range in Excel you can modify the data in Excel and update the chart.

4. You can establish a Link to Excel.

Format your chart. Formatting your chart is likely where you will spend the majority of your time. You have several chart, series, segment, bar, axis, and label formatting options, accessible through toolbars, context menus, and task panes.

When you are satisfied with the look of your chart, click **Close Chart Editor** or simply click off the chart to save your changes.

1.3 System and End-User Requirements

MEKKO GRAPHICS IS COMPATIBLE WITH THE FOLLOWING OPERATING SYSTEMS:

1. Microsoft Windows 8 (32- or 64- bit)

2. Microsoft Windows 10 (32- or 64- bit)

MEKKO GRAPHICS IS COMPATIBLE WITH THE FOLLOWING MICROSOFT OFFICE VERSIONS:

1. Microsoft Office 2013 (32- or 64- bit)

2. Microsoft Office 2016 (32- or 64- bit)

3. Microsoft Office 2019 (32- or 64- bit)

4. Microsoft Office 365 (Desktop version)

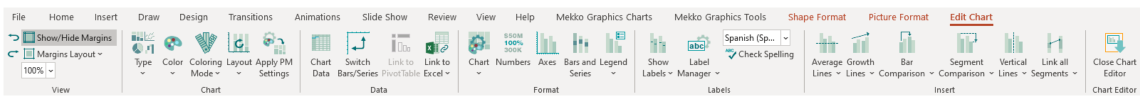
REQUIRED COMPONENTS:

1. Microsoft .NET Framework 4.8

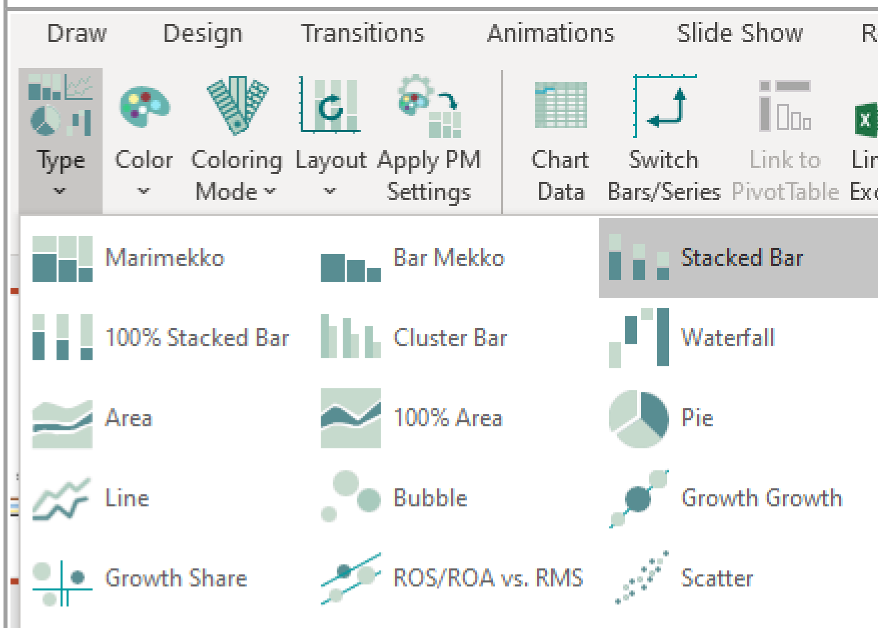
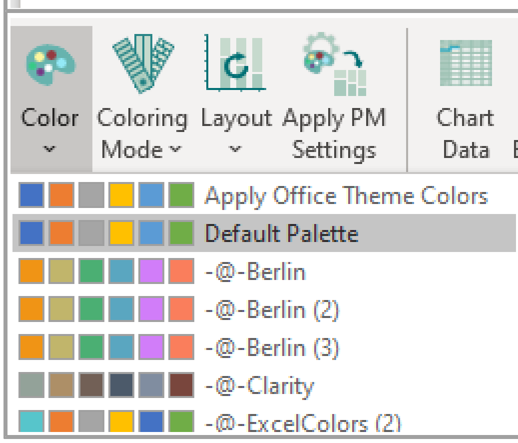
2. Microsoft Visual Studio Tools for the Microsoft Office system (VSTO 2010)

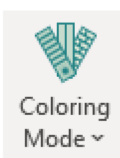
1.4 Edit Chart Toolbar

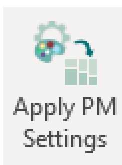
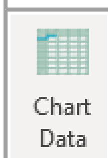
The Edit Chart toolbar is where you will find the majority of functions relating to your Mekko Graphics Chart. Below is a description of all the Mekko Graphics functions available in the Edit Chart toolbar. Many of these functions are also found on the context (right-click) menus. Learn also about the Gantt Edit Chart Toolbar.

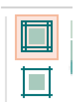
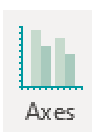


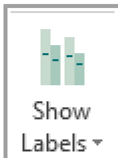
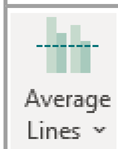
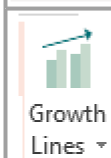
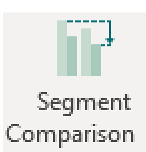
	Undo and Redo any Mekko Graphics chart-related functions. Mekko Graphics includes multiple Undo and Redo functionality. The Undo and Redo function is similar to the way it works in Microsoft Office. To undo the very last change made to your chart, click the Undo button. If the action was not the last action made to the chart,

<table>
<tr><td></td><td>continue clicking Undo to incrementally step back to the original state before the unwanted change was made. Once an undo action has been taken, the redo button will become enabled.</td></tr>
<tr><td>
</td><td>Allows you to change chart type from any charts in any chart family to any other chart in the same family.</td></tr>
<tr><td>
</td><td>Selects the desired color style from the available shades and palettes. The choices in this drop-down menu are driven from the palettes defined</td></tr>
</table>

	in the Preference Manager
	Controls the sorting mode for how colors appear on the chart **By Series Before Sort** - the multicolor draw order is applied before the sort is applied. **By Series After Sort** - the multicolor draw order is applied after the sort is applied. **By Bars** - the multicolor draw order is applied by bar, so every segment in a bar is the same color. **By Segments** - each segment inherits a unique color according the multicolor draw order. For Bubble charts, you can also group your charts by color.

	Changes the orientation of your chart to horizontal or vertical.
	Allows you to take the active Preference Manager settings and apply them to your chart. This will change the default chart colors if those colors, fonts, and other features, if they are different from your Preference Manager settings.
	Allows you to access the data for your chart
	Allows you to flip the chart's display of the data. Your spreadsheet's rows will be displayed as bars, and your columns will be displayed as series.
	Links a chart to the entire pivot table if that chart

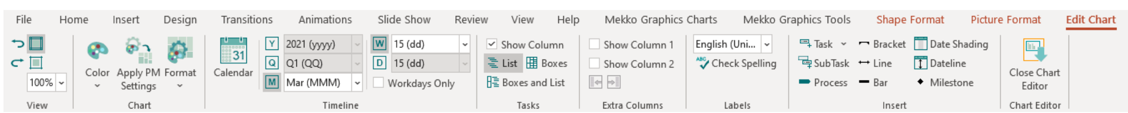
	range intersects with any of pivot table areas in Excel
	Accesses the Link to Excel functions.
	Turns on and off margins and resets them to their default position.
	Accesses Chart-related Mekko Graphics functions
	Accesses Axis-related Mekko Graphics functions
	Accesses Bars- and Series-related Mekko Graphics functions
	Allows you to show/hide your legend and specify Legend properties

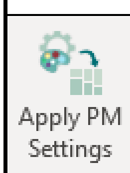
	Allows you to specify your [label display]().
	Accesses the [Label Manager]()
	Runs the spell-check for all the labels in your chart, based on selected language.
	Creates and manages [Average Lines]()
	Creates and manages [Growth Lines]()
	Creates and manages [Bar Comparison Lines]()
	Creates and manages [Segment Comparison Lines]()
	Creates and manages [Vertical Lines]()
	Allows you add [connector lines]() for your series as well as

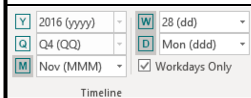
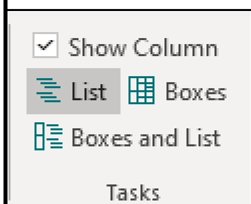
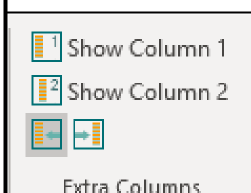
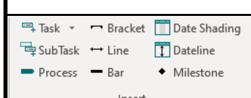
	create custom links between valid segments in your chart.
	Deactivates the chart and inserts it as an object in PowerPoint.

1.5 Gantt Chart - Edit Chart Toolbar

Inserting a Gantt chart displays a unique Edit Chart toolbar customized for gantt charts. Below is a description of the gantt chart-related Mekko Graphics functions available in the Edit Chart toolbar. Many of these functions are also found on the context (right-click) menus.



	Selects the desired color style from the available shades and palettes. The choices in this drop-down menu are driven from the palettes defined in the [Preference Manager](#)
	Allows you to take the active [Preference Manager](#) settings and apply them to your chart. This will change the default chart colors if those colors, fonts, and other features, if they are different from your Preference Manager settings.
	Opens the Format Chart Task Pane which provides more advanced Gantt chart-related options

	Allows you to access the a calendar control to choose date ranges for headers in your chart.
	A toggle that turns on and off the display of years, quarters, months, weeks and days in your gantt chart header. Also allows you to choose formats for each of these time periods. Workdays Only excludes weekend days from displaying in your gantt chart.
	Allows you to assign a format for your gantt chart tasks, where the tasks are displayed as a list (outline form), boxes, or a combination of boxes and lists. The **Show Column** checkbox allows you to show or hide your task list on the Gantt chart
	Allows you the option of displaying one or both resource columns. Once you display your resource column(s), you can also choose to display them on the right or the left hand side of the chart.
	Allows you to quickly insert any Gantt chart timeline element into your Gantt chart.

2 Installation, Registration, Activation

2.1 Installing Mekko Graphics

Installing Mekko Graphics is a simple and automated process. Check to make sure your computer meets the System Requirements. To see more detailed information on installation, please see our Getting Started with Mekko Graphics document.

TO INSTALL MEKKO GRAPHICS

1. First download the Mekko Graphics installation file, MekkoGraphics.exe to your local machine from the Mekko Graphics website

2. Close all Programs

3. Double click the downloaded MekkoGraphics.exe file.

4. The InstallShield Wizard appears. Follow the on-screen instructions to install on to your machine. Once Mekko Graphics is installed on the computer, Click Finish.

5. Once installed, you will need to activate Mekko Graphics.

2.2 Using the Trial Version

Once installation is complete, you can simply launch PowerPoint to start Mekko Graphics. You will see the Mekko Graphics Welcome Screen upon launching PowerPoint.

Go to the Start menu and launch PowerPoint.

When you install Mekko Graphics, the product is a 30-day trial version until you activate the software. It is very important to activate the software within 30 days of installing. Once the 30 days have passed, you will be unable to use the software unless you activate it. To use the trial version, select the second radio button and click Continue.

Please feel free to email us at mekkographicssupport@insightsoftware.com should you have any questions during your trial period.

If you have been using the trial version, and wish to activate during or at the conclusion of your trial period, you may activate by clicking the Help dropdown menu in the Mekko Graphics toolbar and choosing Register.

2.3 Activating Mekko Graphics

When you install Mekko Graphics, the product is a 30-day trial version until you activate the software. It is very important to activate the software within 30 days of installing. Once the 30 days have passed, you will be unable to use the software unless you activate it.

The activation process verifies your product serial number and license.

You have two methods of activation: Automatic and Manual (browser-based) activation. Activation of our software is good for one year from date of purchase. If your subscription has expired, Mekko Graphics will be deactivated on your machine and you will no longer be able to edit Mekko Graphics charts.

Once you have installed Mekko Graphics, launching PowerPoint will bring up the Mekko Graphics Licensing screen.

For more information including detailed step by step instructions for activation and registration, please see our Getting Started document.

2.4 Registering Your Software

If you have not yet registered, please register your copy of Mekko Graphics. Go to the Mekko Graphics tab, and from the Help drop down menu, select "Register". You will be prompted to register your software immediately upon activation. You can choose to register then, or choose to register at any time after activation. Registration is not required to use our product.

Launch Mekko Graphics. Under the Mekko Graphics button, select **Register**.

Type in your demographic information and click Register. A web page appears and confirms your registration. Registration is required and needs to be accurate in order to receive technical support. We do not sell or use this information in any way except for support purposes and to send you updates and news about Mekko Graphics.

2.5 Subscriptions

Mekko Graphics is sold as a subscription-based license. Since our software is tightly integrated with Microsoft PowerPoint, we must be able to provide our users with new releases that are compatible with the latest versions of Office and the latest service packs. Further, we are committed to adding new features to Mekko Graphics to make it more powerful and easier to use so you get the latest and greatest throughout the year!

Each license is valid for one year from date of purchase. A license for Mekko Graphics is issued to individuals and not to machines. Therefore, individual users may install Mekko Graphics on any number of machines (i.e. on both their work and home machines).

Subscribers will be able to download and install new upgrades throughout the year at no additional cost. Subscriptions also include free and unlimited access to our email support services. Our software is delivered electronically. You will receive a link to our web server to download and install the software and a license key to activate it.

Our new Mekko Graphics Portal makes it easy to add users to an active serial number, renew an expired serial number, or renew a serial number that expires within 30 days.

2.6 Uninstalling Mekko Graphics

It is a simple process to uninstall Mekko Graphics. Uninstalling Mekko does not remove PowerPoint presentations with Mekko charts. It only removes the Mekko Graphics application. All of the Mekko Graphics charts you have created are still retained.

1. Exit PowerPoint
2. From the Windows Start menu, select Settings > Control Panel.
3. Choose Programs and Features
4. Click the Install/Uninstall tab (if your version of Windows contains this tab).
5. From the list of programs you can remove, select Mekko Graphics
6. Click Uninstall/Change or doubleclick to uninstall the program
7. At the prompt, click Yes that you wish to remove the program

8. Click OK

9. Uninstalling Mekko Graphics will deactivate the software. You have two options for deactivation: Automatic and Manual (browser-based) deactivation. Your serial number will appear in the field below. (For more information about deactivating, please see Deactivating Mekko Graphics).

2.7 Deactivating Mekko Graphics

Uninstalling Mekko Graphics will deactivate the software. You have two options for deactivation: Automatic and Manual deactivation. There is no way to deactivate your software without uninstalling.

2.8 Upgrading Mekko Graphics

If you are upgrading from a previous version of Mekko Graphics, you do not need to uninstall. Mekko Graphics will detect the older version and uninstall it automatically. Installing our latest version of Mekko Graphics will silently uninstall your older version and install the latest version for you.

3 Overview of Charts

3.1 Bar/Area/Line Charts at a Glance

The science of charting is a way of communicating information visually to people in an effective manner. Each chart type presents information differently. When considering the type of chart to choose, you need to understand the advantages of each type of chart and think about the data you plan to present. Understanding the advantages of each chart type will help you leverage your data and present it clearly and effectively.

Below is an overview of the different bar/area/line chart types supported by Mekko Graphics. A comprehensive slide deck is also available for download, which displays working examples of every chart type supported.

To see a sample presentation with an example of each chart type, click here.

A. MARIMEKKO

Variable width 100% stacked bar. Segment height is the segment value as a % of the bar total and bar width is the bar total as a % of the grand total. Examples: Sales by customer and region, Profits by product and division, Customers by competitor and country.

B. BAR-MEKKO

Variable width stacked bar. Segment height is the absolute segment value and bar width is the bar total as a % of the total for all bars in the series. The bar width is typically a volume measure that helps explain the impact of the primary variable. Use a data row to display the bar width series to help explain the chart. Example: Product profitability with gross margin on the Y axis and sales on the X axis.

C. WATERFALL

Shows how each bar contributes to the total and each bar is shown in relationship to the other bars. Set any bar as a total bar by right clicking on the bar in the data sheet and selecting "Set Bar as Total". Example: Each cost component that contributes to total cost.

E. CLUSTER BAR

Shows values for multiple series and cluster bars together for comparison while adding a line to show an overall trend in another variable. You can choose to plot the line on the Y or 2Y axis by right clicking on the series name in the data sheet or selecting Bars and Series from the Edit Chart ribbon.

STACKED BAR

Shows the segment relationship to the total while adding a line to show the overall trend for another series. You can plot a line on either the Y or 2Y axis by right clicking on the series name in the data sheet or using Format Bars and Series from the Edit Chart ribbon. Example: Average Revenue per User with a line showing margin % on the 2Y axis. You may also cluster bars together for comparison purposes.

100% STACKED BAR

Shows each segment in a series as a % of the bar total. Use segment links to highlight changes in segment values across bars.

AREA

Shows the change for each series over time and the relationship of the series to the total. Highlights absolute and relative changes.

100% AREA

Shows the change for each series over time as a % of the total. Highlights relative changes. Example: Product sales over time.

LINE

Plots series of data points relative to the Y axis at equal time intervals on the X axis for the purposes of trend analysis. A Line chart plots series of data points relative to the Y axis at equal time intervals on the X axis for the purposes of trend analysis. The user can choose a series to plot as a 2nd Y axis.

PIE CHART

A pie chart shows the size of items that make up a data series proportional to the sum of the items. Pie charts always show only one data series and consist of a circle divided into wedged segments. It shows the relative sizes of components to one another and to the whole pie.

3.2 Bubble/Scatter Charts at a Glance

The science of charting is a way of communicating information visually to people in an effective manner. Each chart type presents information differently. When considering the type of chart to choose, you need to understand the advantages of each type of chart and think about the data you plan to present. Understanding the advantages of each chart type will help you leverage your data and present it clearly and effectively.

Below is an overview of the different bubble/scatter chart types supported by Mekko Graphics. A comprehensive slide deck is also available for download, which displays working examples of every chart type supported.

BUBBLE CHART

Shows 3 variables for each bubble, X and Y values and the bubble size. Can be shown on a linear or log scale. Example: Compare stocks using P/E ratio on the X axis, Dividend yield on the Y axis and Market capitalization as the bubble size.

GROWTH-GROWTH

Show 2 measures of growth for each bubble and the bubble size. Can be shown on a linear or log scale. Use a regression line to show the trend with respect to both variables. Example: Volume growth and Sales growth with Revenue as the bubble size.

GROWTH-SHARE

Compare companies within an industry or divisions/products within a company using Relative Market Share on the X axis (inverse log scale) and Market growth on the Y axis.

ROS/ROA VS. RMS

Compare companies within an industry using Relative Market Share (RMS) on the X axis (inverse log scale) and a measure of profitability (Return on Assets or Return on Sales) on the Y axis with a volume measure (Revenue) as the bubble size. The normative band shows the expected profitability range given a bubble's RMS..

SCATTER CHART

Show the distribution of data points (X and Y values) to identify a potential relationship or determine outliers. Data can be plotted using a linear or log scale. Add a regression line to show the trend. Example: Revenue growth and Earnings growth for each product category in an industry.

3.3 Marimekko Chart

Marimekko charts are two dimensional graphs that analyze multiple data series against two variables, the X and Y axes. You can think of it as a variable width 100% stacked bar chart. The graphs are so named for their tapestry-like appearance. The Marimekko graph can be used in many different industries. Its function is to display a system of interrelated values so that both groups and relative sizes of the elements can be seen at the same time. In a Marimekko chart, the width of the columns are proportional to data represented by the columns. Individual segment height is a percentage of the respective bar total value.

APPLICABLE FUNCTIONS:

CHART
SHADING
TOTALS

AVERAGE LINE
VERTICAL LINE
SEGMENT COMPARISON LINE
GRIDLINES

BAR
SORT BARS
BAR LABELS
BAR WIDTHS
HIDE/SHOW BARS
DATA COLUMNS

SERIES
PATTERNS
HIDE/SHOW SERIES
SHOW SERIES AS LINE
DATA ROWS
OTHER SERIES
BORDER
SORT SERIES

AXIS
AXIS SCALE
AXIS APPEARANCE
AXIS BREAKS

3.4 Bar Mekko

Bar-Mekko charts also analyze data against the X and Y axis. The difference is that Bar-mekkos look only at one segment of data. There are both single variable and double variable Bar-mekkos. There are two types of Bar-mekko charts, single and double variable, which is defined by the number of data series plotted. To create double-variable Bar-mekko you must add a bar width row to the data spreadsheet.

APPLICABLE FUNCTIONS:

CHART
SHADING
TOTALS
AVERAGE LINE
VERTICAL LINE
SEGMENT COMPARISON LINE
GRIDLINES

BAR

SORT BARS
BAR LABELS
BAR WIDTHS
HIDE/SHOW BARS
DATA COLUMNS

SERIES
PATTERNS
HIDE/SHOW SERIES
SHOW SERIES AS LINE
DATA ROWS
OTHER SERIES
BORDER
SORT SERIES

AXIS
AXIS SCALE
AXIS APPEARANCE
AXIS BREAKS

3.5 Stacked Bar

A Stacked Bar chart shows the relationship of individual segments to the whole. Each bar represents the total value of a data series and each item in the series is represented by a segment of the bar. The value of each bar and bar segment is measured vertically on the Y axis. In order designate a series as a line , go to Format --> Series and choose which series you would like to display as a line, or right click the series and choose Show Series as Line. You may also plot a series in the data as a 2nd Y axis. In order to plot a series onto the 2nd axis, the series must first be designated as a line and then that series is available to be plotted on the 2Y axis.

APPLICABLE FUNCTIONS:

CHART
SHADING
TOTALS
AVERAGE LINE
GROWTH LINE
BAR COMPARISON LINE
VERTICAL LINE
SEGMENT COMPARISON LINE
GRIDLINES

BAR
GAPS
SORT BARS

BAR LABELS
HIDE/SHOW BARS
DATA COLUMNS

SERIES
PATTERNS
HIDE/SHOW SERIES
DATA ROWS
OTHER SERIES
SHOW AS NET LINE
BORDER
COMPARISON LINES
SORT SERIES

AXIS
AXIS SCALE
AXIS APPEARANCE
AXIS BREAKS

3.6 100 Stacked Bar

A 100% Stacked Bar chart shows the relationship of individual segments to the whole. Each bar represents 100% the total value of a data series and each item in the series is represented by a percentage segment of the bar. The value of each bar and bar segment is measured vertically on the Y axis. While the total percentage measured for any one bar is always representative of 100%, the actual total value represented by each bar may vary.

APPLICABLE FUNCTIONS:

CHART
SHADING
TOTALS
AVERAGE LINE
VERTICAL LINE
SEGMENT COMPARISON LINE
GRIDLINES

BAR
GAPS
SORT BARS
BAR LABELS
HIDE/SHOW BARS
DATA COLUMNS

SERIES
PATTERNS
HIDE/SHOW SERIES
DATA ROWS
OTHER SERIES
BORDER
COMPARISON LINES
SORT SERIES

AXIS
AXIS SCALE
AXIS APPEARANCE
AXIS BREAK

3.7 Waterfall

Waterfall charts (sometimes known as cascade charts) categorize revenue or cost components of a market segment, as defined by the data series being measured. Each bar is related to and effected by the values in the surrounding bars. That is, given the first bar value, the next bar adds (or subtracts) to it a second value. The third bar then adds (or subtracts) to that value, and so on. The last bar shows the final value after all additions (or subtractions) have been made. You can create or designate a bar as a total bar, which is the sum of the intermittent bars in the waterfall chart.

APPLICABLE FUNCTIONS:

CHART
SHADING
TOTALS
AVERAGE LINE
GROWTH LINE
BAR COMPARISON LINE
VERTICAL LINE
SEGMENT COMPARISON LINE
GRIDLINES

BAR
TOTAL BAR
GAPS
BAR LABELS
HIDE/SHOW BARS
DATA COLUMNS
SET PREVIOUS BAR
SORT BARS

SERIES
PATTERNS
HIDE/SHOW SERIES
DATA ROWS
OTHER SERIES
SHOW AS NET LINE
BORDER
COMPARISON LINES
SORT SERIES

AXIS
AXIS SCALE
AXIS APPEARANCE
AXIS BREAK

3.8 Cluster Bar

Simple and cluster bar charts are bar charts designed to display changes in data over time. A simple bar chart compares items for one data series. A cluster bar chart compares two or more data series plotted side-by-side. The bars are always in the same position for each grouping throughout the graph, so comparisons may be made. In order designate a series as a line , go to Format --> Series and choose which series you would like to display as a line, or right click the series and choose **Show Series as Line**. In order to plot a series onto the 2nd axis, the series must first be designated as a line and then that series is available to be plotted on the 2Y axis

APPLICABLE FUNCTIONS:

CHART
SHADING
TOTALS
AVERAGE LINE
GROWTH LINE
BAR COMPARISON LINES
VERTICAL LINES
SEGMENT COMPARISON LINES
GRIDLINES

BAR
GAPS
SORT BARS
BAR LABELS
HIDE/SHOW BARS
DATA COLUMNS

SERIES
PATTERNS
HIDE/SHOW SERIES
SHOW AS NET LINE
DATA ROWS
OTHER SERIES

AXIS
AXIS SCALE
AXIS APPEARANCE
AXIS BREAKS

3.9 Line

Plots series of data points relative to the Y axis at equal time intervals on the X axis for the purposes of trend analysis. You can choose a series to plot as a 2nd Y axis. In order to plot a series onto the 2nd axis, the series must first be shown on the chart, and then that series is available to be plotted on the 2Y axis.

APPLICABLE FUNCTIONS:

CHART
SHADING
AVERAGE LINE
VERTICAL LINE
GRIDLINES

BAR
BAR LABELS
HIDE/SHOW BARS
DATA COLUMNS

SERIES
PATTERNS
HIDE/SHOW SERIES
DATA ROWS

AXIS
AXIS SCALE
AXIS APPEARANCE
AXIS BREAKS

3.10 Pie

A pie chart shows the size of items that make up a data series proportional to the sum of the items. Pie charts always show only one data series and consist of a circle divided into wedged segments. It shows the relative sizes of components to one another and to the whole pie.

APPLICABLE FUNCTIONS:

CHART
SHADING
SELECT START ANGLE FOR PIE

SERIES
PATTERNS
HIDE/SHOW SERIES
BORDER
HIGHLIGHT SERIES

3.11 Doughnut

A doughnut chart shows the size of items that make up a data series proportional to the sum of the items. Doughnuts charts always show only one data series and consist of a circle divided into wedged segments. It shows each segment's share of the total.

APPLICABLE FUNCTIONS:

CHART
SHADING
SELECT START ANGLE

SERIES
PATTERNS
HIDE/SHOW SERIES
BORDER
HIGHLIGHT SERIES

3.12 Area

An area chart displays how relative mixtures of a given category change over time. By displaying the sum of the plotted values, it shows the relationship of parts to a whole. Area graphs usually do not display specific values, but rather show trends and relationships.

APPLICABLE FUNCTIONS:

CHART
SHADING
AVERAGE LINE
VERTICAL LINE

BAR
BAR LABELS
HIDE/SHOW BARS
DATA COLUMNS

SERIES
PATTERNS
HIDE/SHOW SERIES
SHOW SERIES AS LINE
DATA ROWS
BORDER

AXIS
AXIS SCALE
AXIS APPEARANCE
AXIS BREAK

3.13 100 Area

An area chart displays how relative mixtures of a given category change over time. By displaying the sum of the plotted values, it shows the relationship of parts to a whole. Area graphs usually do not display specific values, but rather show trends and relationships. The total percentage measured for any one time unit is always representative of 100%.

APPLICABLE FUNCTIONS:

CHART
SHADING
AVERAGE LINE
VERTICAL LINE

BAR
BAR LABELS
HIDE/SHOW BARS
DATA COLUMNS

SERIES
PATTERNS
HIDE/SHOW SERIES

DATA ROWS
BORDER

AXIS
AXIS SCALE
AXIS APPEARANCE
AXIS BREAK

3.14 Bubble Chart

Bubble charts plot three variables simultaneously. X and Y variables indicate how one item (X) varies in relation to another (Y), and bubble size indicates relative scale. Bubble charts can plot the X and Y variables as linear or logarithmic. Log scales cannot plot negative or zero data and are typically used to display regression analysis.

APPLICABLE FUNCTIONS

CHART
SHADING
QUADRANT LINES
AVERAGE LINE
REGRESSION LINE

SERIES
PATTERNS
HIDE/SHOW SERIES
BORDER
OUTLIER
BUBBLE ORDER

AXIS
REVERSE DIRECTION
REFERENCE BUBBLE
AXIS BREAK

3.15 Growth Growth

Growth/Growth bubble charts illustrate the relationship between market growth rates and product (or company) growth rates. The bubble size reflects the amount of revenue generated by each product (or company). The regression line plots the trend with respect to both rates.

APPLICABLE FUNCTIONS

CHART
SHADING

AVERAGE LINE

SERIES
PATTERNS
HIDE/SHOW SERIES
BORDER
OUTLIER

AXIS
REVERSE DIRECTION
REFERENCE BUBBLE
AXIS BREAKS

3.16 Scatter Chart

An Scatter chart shows the relationships among the numeric values in several data series. It displays clusters of quantitative data at uneven intervals on either a linear or logarithmic scale. You can plot either two groups of numbers as one series of XY coordinates or display the relationship (regression) among numeric values in several data series. An XY Log chart shows an experience curve, which is a regression that displays the relationship between accumulated experience (logarithmic X axis) and constant dollar price (or cost) per unit (logarithmic Y axis). The data points usually represent the price (or cost) and experience for a given year.

APPLICABLE FUNCTIONS

CHART
SHADING
QUADRANT LINES
AVERAGE LINE
REGRESSION LINES

SERIES
PATTERNS
HIDE/SHOW SERIES
SHOW LINES
SHOW REGRESSION LINES

AXIS
REVERSE DIRECTION
AXIS BREAKS

3.17 Growth Share

Growth/Share charts compare companies within an industry or the relative position of different products (or divisions) within one company. The charts display the relationship between relative market share (inverse logarithmic X axis) and market growth (linear Y axis). The growth-share matrix is used as an analytical tool to help corporations analyze their business units or product lines, and decide where to allocate cash.

APPLICABLE FUNCTIONS

CHART
SHADING
GROWTH/SHARE LINES
AVERAGE LINE

SERIES
PATTERNS
HIDE/SHOW SERIES
BORDER
OUTLIER

AXIS
REVERSE DIRECTION
REFERENCE BUBBLE
AXIS BREAKS

3.18 ROS ROA vs RMS

ROS/ROA vs. RMS bubble charts depict the relationship between companies' Return on Sales or Return on Assets (linear Y axis) and their Relative Market Share (logarithmic X axis). The bubble size reflects either sales or net income for each company. The normative band illustrates the expected profitability range given a company's RMS.

APPLICABLE FUNCTIONS

CHART
SHADING
AVERAGE LINE
NORMATIVE BAND

SERIES
PATTERNS

HIDE/SHOW SERIES
BORDER
OUTLIER

AXIS
REVERSE DIRECTION
REFERENCE BUBBLE
AXIS BREAKS

3.19 Gantt

The Gantt chart is a project management tool that displays a graphical representation of the stages or activities in a project work plan over time. Each task displays as a horizontal bar whose length is proportional to its time for completion.

A Gantt chart is logically broken down into three areas. On the left side of the chart is a column where the task and milestone text descriptions are written. On the right side of the chart is the graphical timeline display corresponding to each task or milestone. A third, optional component may be displayed between the task / milestone text and the graphical display which corresponds to the resource column(s) in the spreadsheet.

The Gantt chart displays a project's task and timeline information using calendar dates. The software then calculates the task duration based on the calendar difference between the two dates and the length of the work week.

APPLICABLE FUNCTIONS:

HEADERS
RESOURCE COLUMNS
GRIDLINES
PERIOD SHADING
TASKS
TIMELINES
MILESTONES

4 Chart Creation

4.1 Entering Data

To enter data into your chart, either double click the chart area or right-click the chart area and select Edit Chart Data to access the data spreadsheet. Alternatively, you may click the Chart Data button in the Edit Chart toolbar.

Bar labels are generally listed across the top of the spreadsheet, and series labels are listed down the spreadsheet. The first row is designated for Bar names and first column for Series names. The first cell (A1) should be empty.

The chart dynamically draws as you enter data into these rows and columns. To enter data into the spreadsheet, you may do any one of the following:

1. Enter data directly as you would in Excel

2. Copy and paste from an existing Excel spreadsheet

3. Link to Excel.

4. Create the chart directly from Excel

EDIT IN EXCEL FEATURE

An exciting feature of Mekko Graphics is our Edit in Excel feature. The Edit in Excel  button on your spreadsheet toolbar will launch an instance of Excel. Once you press the Edit in Excel button, your Mekko Graphics data will be automatically copied to an Excel spreadsheet and able to be edited. Any edits you make in Excel are then copied back to your data sheet in Mekko Graphics either by clicking back on the data sheet or by clicking the Excel close box.

SWITCH BARS/SERIES

In Mekko Graphics, series data is represented by rows and bar data is represented by columns in your chart. However, you can choose to flip the chart's display of the data. Your spreadsheet's rows will be displayed as bars, and your columns will be displayed as series. To switch your rows and columns in the chart's display, click the Switch Bars and Series  button in your spreadsheet toolbar or in the Edit Chart Toolbar. Your spreadsheet will not change, but the chart will display with the bars and series switched.

4.2 Apply Colors from Cell Spreadsheet

APPLIES TO: All Bar and Bubble Charts

In Mekko Graphics, you can choose to use your Mekko Graphics spreadsheet cell background colors and apply those colors to your chart. These cell background colors can be obtained by copying data ranges from Excel that have colored cells, either by Excel conditional formatting or by manual application of cell colors. You can also link to Excel ranges containing cell colors.

In Mekko Graphics, copy from (or link to) a data range in Excel that utilizes fill colors or color-conditional formatting. To apply the Excel formatting to your chart, simply click the Apply Cell Colors from Spreadsheet checkbox in the **Format Chart Task Pane**. The Excel colors will be automatically applied to the corresponding segments in your chart. Note, if you manually apply a color to a segment or series in your Mekko Graphics chart, that color will override the spreadsheet color for those segments or series.

4.3 Importing Charts from Microsoft Graph

Mekko Graphics contains the ability to import Mekko Graphics-supported chart types from Microsoft Graph and create a comparable Mekko Graphics chart. Mekko Graphics imports all data, axis information, and series definition (i.e. that data is defined as a line, a bar, a bubble, etc.). Mekko Graphics can import a limited amount of information from these charts. We will typically be able to extract the data from these charts and some of the label information. Information that is added directly to PowerPoint and not stored in the Microsoft Graph object will not be imported.

To import a Microsoft Graph object, navigate to the chart in PowerPoint, and then choose:

All Charts in Current Slide to insert the chart(s) on the current slide

or

All Charts in Current Presentation to import all the charts in your presentation

4.4 Creating Mekko Graphics Charts from MS Excel

Mekko Graphics allows you to create charts both in PowerPoint and Excel directly from Microsoft Excel via a Mekko Graphics Add-In in Microsoft Excel. When you create a chart from an Excel range, a link is created between that data range and the Mekko Graphics chart.

For information on creating PowerPoint tables from Excel ranges, click here.

Creating a Mekko Graphics Chart from Excel into PowerPoint

1. Select a valid range in Excel workbook.

2. From the Mekko Graphics menu in Excel, select the icon **Chart In PowerPoint**

3. Choose your desired Mekko Graphics chart type to be inserted in a Power Point slide from the Mekko Graphics menu in Excel.

4. Switch to PowerPoint, choose an existing slide or create a new slide and click once to insert a chart.

The Mekko Graphics chart will insert in PowerPoint and a link will be established between the Excel range and the chart. This allows you to ensure your chart is consistent with the latest data in that Excel range. You can choose to have the chart update automatically whenever the data in the Excel range changes, or choose to refresh the chart manually whenever you wish to update the chart.

After establishing a link between Excel range and a Mekko Graphics chart in PowerPoint, both Excel and PowerPoint files continue to be independent files. This means, you can edit, move, or rename the files. The links will be reestablished as soon as the Excel and PowerPoint files are opened at the same time. To store the information about the reestablished link the files should be saved.

Creating a Mekko Graphics Chart from Excel into Excel

1. Select a valid range in Excel workbook.

2. From the **Mekko Graphics** menu in Excel, select the icon **Chart In Excel**

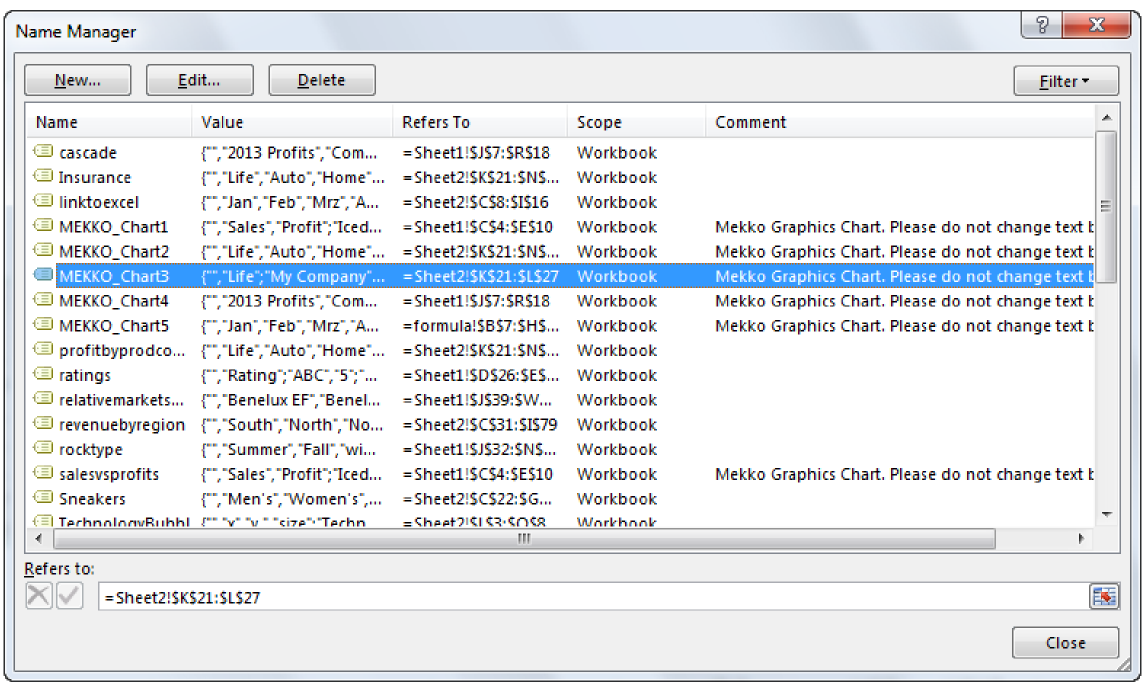
3. Choose your desired Mekko Graphics chart type from the **Mekko Graphics** menu in Excel.

Changing any data in the Excel range will automatically update the chart.

Using Excel Ranges and the Name Manager

The Mekko Graphics ribbon in Excel includes three groups: Insert Mekko Graphics charts, Chart Data and Resources.

The Name Manager belongs to Chart Data group and is the standard Excel Name Manager. There is also a drop-down box that only shows Mekko Graphics ranges. When a Mekko Graphics chart is created from Excel, the unique range name is also created in the Name Manager:"zzMG_Chart##". The Name Manager in Excel gives you control over all the ranges in your spreadsheet and allows you to create new, edit existing, or delete ranges in Excel. A filter provides the ability to view desired subsets of the ranges.



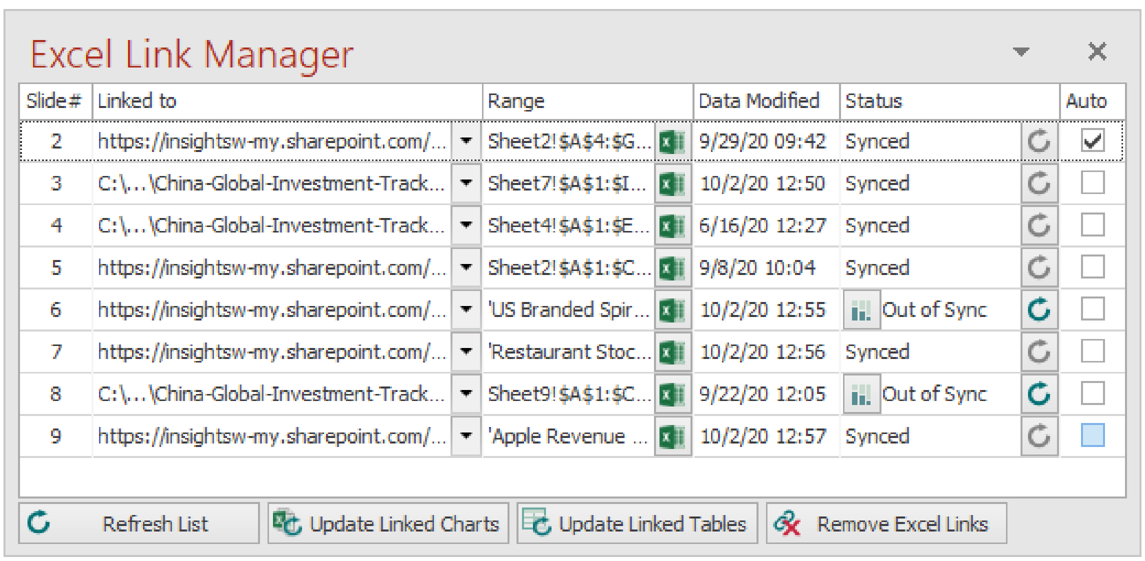
Managing your Linked Charts

Mekko Graphics helps you determine the condition of charts that are linked to Excel in several ways. When you double click on a chart with an established Excel Link, the chart will have a colored frame. The frame is green when data in a chart is in sync with data in the corresponding Excel range. The frame is red when data is out of sync with data in the corresponding Excel range. And if data is out of sync, you will also see a red flag upon a single click of the chart.

When that data in Excel changes, you can either update the charts by initiating the update, or have Mekko Graphics do the update automatically. To manage your charts, use the **Excel Link Manager**.

Excel Link Manager

The Excel Link Manager provides important information on all the linked charts in your presentation, including the file path, the name of the linked file, the address of the range, and the status of the link, including the last known date when the range was modified, and provides the ability to update any chart or all charts in your presentation through a single mouse click.



There are 3 possible states of a chart linked to Excel:

1. Synced

2. Out of sync.
   If the file is out of sync, the reason will be either due to data change in Mekko Graphics (Mekko Graphics icon), Excel (MS Excel icon) or both

3. Unknown (if Excel file with corresponding range is closed or cannot be found)

You can refresh a link for a specific chart by clicking the **Refresh Excel Data** button for that row.

Update Linked Charts updates chart's data from excel ranges for all existing links in Power Point presentation for opened and closed excel files.

The **Refresh List** button to refresh the rows to the latest status.

Included in the Excel Link Manager is an **Auto** checkbox (for Auto Update). The Auto checkbox indicates whether or not the chart should update automatically as soon as changes in the linked data are detected. By default this is off, but you can turn this feature on for any linked chart. If **Auto Update** is set for the chart, then the user cannot edit data in the Mekko Graphics spreadsheet. Change detection works only while both files, Excel and PowerPoint, *are open at the same time*.

If you wish to remove an Excel link, double click the chart, and from the **Link to Excel** menu, choose **Remove**. From that point, the chart only uses the data in the Mekko internal data sheet unless you reestablish a link.

For more information on the Link to Excel function please see Link to Excel.

4.5 Link To Excel

APPLIES TO: ALL CHARTS EXCEPT GANTT

Link to Excel is a feature that allows you to import data from Microsoft Excel™ into Mekko Graphics. This feature is used in the event where you have a fixed chart that points to a changing data source (for instance, a weekly sales report) which allows you to simply replace the data source and refresh your chart, rather than repeatedly copy and paste new data each time the chart needs an update. Once a link has been made, Mekko Graphics will remember the Excel range that was used so that future updates can be made.

You can define a selection in Microsoft Excel™ with a name, and link to that named range in Mekko Graphics.

STEPS TO LINK TO EXCEL

CREATING A RANGE IN MICROSOFT EXCEL™

1. In Microsoft Excel™, select the range you wish to name by highlighting the cells you wish to be included in the range.

2. Once highlighted in Excel, name the range

3. Ensure the spreadsheet has been saved at least once.

LINKING TO EXCEL

1. Launch Microsoft PowerPoint™ and activate the chart for which you wish to establish a link

2. From the Edit Chart toolbar, choose Link to Excel --> Link

3. The Link to Excel form will open.

4. To link to an existing named range, click the ... button and navigate to the location of the spreadsheet containing the named range. Choose the first radio button Use an Existing Named Range. Select your desired named range from the drop down menu. The address of that range will appear in the Address field below. To create a new range, choose the radio button Create a New Named Range. Mekko Graphics will create a range on-the-fly based on the selection in Excel.

5. The data from that named range will auto-populate your data view.

Advanced Tip - The Address field contains the worksheet name, which must be surrounded by single quotes if that name contains any spaces. For example, if the worksheet is named Sales Data, be sure to add single quotes around the address field name 'Sales Data'!$A$15:$I$19.

TO REMOVE A LINK TO EXCEL:

You may remove any established links to Microsoft Excel™ from Mekko Graphics. The Remove option is only enabled if there is already an established link. It is not enabled if there is no link. Removing a link simply removes the reference to Excel; it does not remove the data. From the Edit Chart toolbar, choose Link to Excel --> Remove

You can also remove all Excel links in your chart through the Excel Link Manager.

REFRESH LINK TO EXCEL

Mekko Graphics allows you to manually refresh an established link to Excel. When you refresh your link, the data in Microsoft Excel™ will re-populate the referenced data table. Therefore, any changes to the data in your Excel range will be reflected in your data sheet. The Refresh option is only enabled if there is an established link. If there is no link, the **Refresh** button is disabled.

You can manually refresh linked data from the Excel spreadsheet. The refresh can be for one chart or can be initiated for all charts in your slide deck through the Excel Link Manager. From the Edit Chart toolbar, choose Link to Excel --> **Refresh**. The linked data will be refreshed.

HOW TO OPEN A LINKED FILE

Mekko Graphics allows you to open the linked file in Microsoft Excel™. You can view the Microsoft Excel™ range and even make changes directly in Excel. When you refresh your link, any new data in Microsoft Excel™ will re-populate the referenced data table. From the Edit Chart toolbar, choose Link to Excel --> Open Linked File.

For more information about the ability to create linked charts directly from Excel or to set up automatic updates of charts based on linked data in Excel, please refer to our section detailing our Mekko Graphics Excel Add-In.

4.6 Link to Pivot Table

APPLIES TO: ALL CHARTS EXCEPT GANTT

Mekko Graphics supports the ability to link a chart to an entire pivot table in Excel. If you create a chart from an Excel range, and that range intersects any part of a pivot table, this function will automatically adjust the chart to the entire pivot table. If the pivot table grows or collapses due to data changes, the chart can adjust to the updated pivot table once the pivot table is refreshed in Excel.

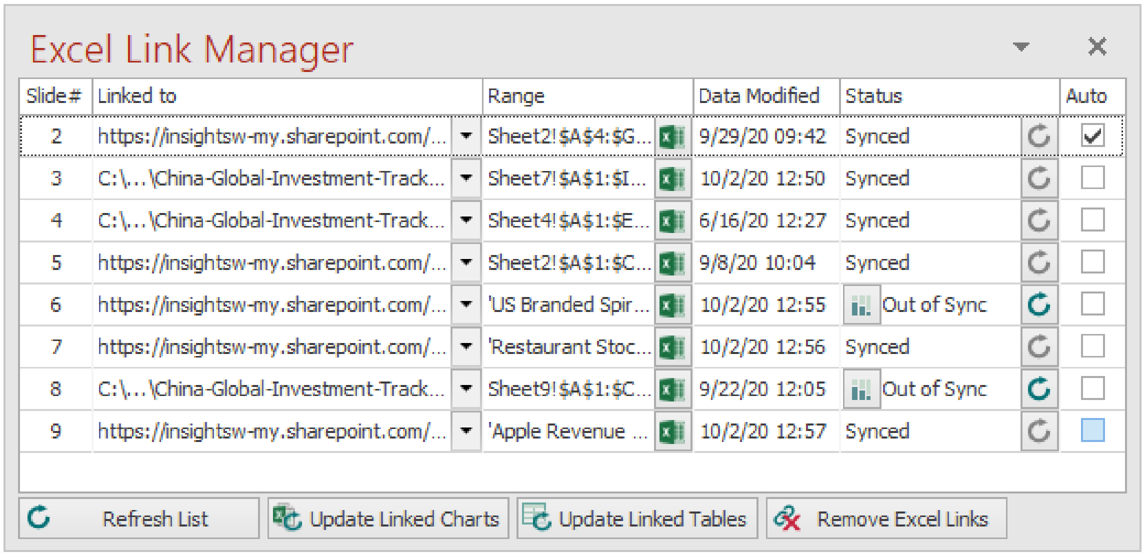
The chart range in Excel refreshes automatically if the data is changed in the Excel pivot table. (Note: If the source data is changed in Excel, the user must refresh pivot table). The Mekko Graphics chart in PowerPoint could be adjusted to pivot table and will refresh automatically if autosync is checked in the Excel Link Manager.

To Link to a Pivot Table

1. Insert a Mekko Graphics chart in PowerPoint from an Excel range that is part of a pivot table
2. From the Edit Chart toolbar, click **Link to Pivot Table**
3. The chart will update to the entire pivot table.

4.7 Excel Link Manager

The Excel Link Manager provides important information on all the linked charts and tables in your presentation, including the file path, the name of the linked file, the address of the range, and the status of the link, including the last known date when the range was modified, and provides the ability to update any chart or all charts in your presentation through a single mouse click.



There are 3 possible states of a chart linked to Excel:

1. Synced

2. Out of sync.
   If the file is out of sync, the reason will be either due to data change in Mekko Graphics (Mekko Graphics icon), Excel (MS Excel icon) or both.

3. Unknown (if Excel file with corresponding linked range is closed)

You can refresh a link for a specific chart by clicking the **Refresh Excel Data** button for that row, or refresh all charts in your presentation by choosing the **Update Linked Charts** button. Click the **Refresh List** button to refresh the rows to the latest status.

Included in the Excel Link Manager is an **Auto** checkbox (for Auto Update). The Auto checkbox indicates whether or not the chart should update automatically as soon as changes in the linked data are detected. By default this is off, but you can turn this feature on for any linked chart. If Auto Update is set for the chart, then the user cannot edit data in the Mekko Graphics spreadsheet. Change detection works only while both files, Excel and PowerPoint, are open at the same time.

If you wish to remove a specific Excel link, double click the chart, and from the **Link to Excel** menu, choose **Remove**. From that point, the chart only uses the data in the Mekko internal data sheet unless you reestablish a link. You can also remove all the Excel Links in your presentation by clicking the button **Remove Excel Links**.

For more information on the Link to Excel function please see Link to Excel.

4.8 Entering Negative Values

Certain charts, by their nature, will not accept negative numbers.

NEGATIVE NUMBER RESTRICTIONS

Negative Values are permitted for the following charts:

Marimekko, Bar-Mekko, Stacked Bar, Cluster Bar, 100% Stacked Bar, Waterfall, Line, and Pie chart, (a Pie chart interprets a negative value as a positive value).

THE FOLLOWING RESTRICTIONS APPLY TO THE BUBBLE AND SCATTER CHARTS.

XY Linear Bubble - both X and Y values may be negative, but bubble size must be a positive number.

X Log Bubble- X Log value must be greater than zero, and bubble size must be positive number.

Y Log Bubble - Y Log value must be greater than zero, and bubble size must be a positive number.

XY Log Bubble - Both X and Y log values must be greater than zero and bubble size must be a positive number.

Growth-Growth - both X and Y values may be negative, but bubble size must be a positive number.

Growth-Share - X values must be greater than zero, and bubble size must be a positive number.

ROS ROA vs RMS - X values cannot be greater than zero, and bubble size must be a positive number.

XY Linear Scatter - both X and Y values may be negative

X Log Scatter - X Log value must be greater than zero

Y Log Scatter - Y Log value must be greater than zero

XY Log Scatter - Both X and Y log values must be greater than zero

SHOWING NET VALUES OF BARS

When a bar has both positive and negative segments, you can choose to only display net effect of positive and negative bars. Go to the **Format Chart Task Pane**, General tab, and check the **Show Net Bar Total** checkbox.

REVERSE ORDER FOR NEGATIVE SEGMENTS

One of your sorting options is the option to reverse the display order for negative segments in your chart. If you choose to reverse your display of negative segments in your chart, your chart will display the spreadsheet sort order you have selected, but will reverse the spreadsheet order for all the negative segments in the bar.

4.9 Zero Value Restrictions

Certain charts have specific rules for how values of zero are displayed in the chart.

- In Mekko and Bar charts, if a series is displayed as a bar and a segment in that series has a value of zero or is blank, the segment is not drawn in that chart and the label for that segment is ignored (will not exist in the Label Manager).

For Cluster Bar charts, if a bar has zero height due to the sum of the bar segments equaling zero, the bar is displayed at a net height of zero and both the bar labels and totals are displayed. If all segments are zero, the bar label is displayed, but no segment or total labels are displayed. They also are not displayed in the Label Manager.

For a bar of zero width (Marimekko or Bar-Mekko), segment labels are not displayed and bar labels and bar totals reside in the Label Manager as Unplaced.

- For Line or Bar Line charts, if a segment value (point) is blank, Mekko Graphics will not draw a line through that point. If the segment value is zero, Mekko Graphics draws a line through the zero point value.

- For Area charts, if a segment value is blank or zero, it is treated as zero value.
- For Pie Charts, if a segment value is blank or zero, the segment is not drawn and the segment label is ignored (will not exist in the Label Manager).

5 Formatting Your Chart

5.1 General Settings

Mekko Graphics gives you control over other general settings described below.

APPLIES TO: ALL CHARTS unless indicated otherwise

Mekko Graphics gives you control over other general settings described below.

Use Blank Series/Bars Names

Displays the data for the Bar or Series regardless of whether it has a row or column or row name.

Place All Labels

Forces all of the labels to displays in the chart, even if they overlap. By checking this checkbox, no labels will be unplaced.

Show Net Bar Total

Displays the net bar total on a bar chart including the negative segments.

Show Bars with Zero Values

Displays bars on the chart, even if the value for those bars is zero.

Same Y Zero Level

Displays the zero values on the same x axis in 2Y line or bar line charts.

Show/Hide Axis

Allows you to hide or show the X and Y axes on your chart

Use Linear X Axis

Forces a linear scale on a bar mekko or marimekko chart as opposed to a categorical scale.

5.2 Chart-Level Formatting

Chart Level formatting includes formatting options that affect the entire chart.

YOUR OPTIONS FOR CHART-LEVEL FORMATTING FOR BAR, LINE AND AREA CHARTS ARE:

1. Colors
2. Layout
3. Totals and Number Formatting
4. Average Lines (both computed and manual)
5. Growth Lines (marimekko, bar mekko, stacked bar, waterfall, and cluster bar chart types, excluding 100% charts)
6. Bar Comparison Lines (marimekko, bar mekko, stacked bar, waterfall, and cluster bar chart types, excluding 100% charts)
7. Segment Comparison Lines (stacked bar, waterfall, cluster, line and mekko chart types)
8. Vertical Lines (marimekko, bar mekko, and bar charts, unless they have a linear axis)
9. Link all Segments (stacked bar, cluster, and waterfall chart types)
10. 100% Calculation (bar charts, excluding area, line, and pie)
11. Gridlines

12. General Settings

13. Custom Sort for series and bars

YOUR OPTIONS FOR CHART-LEVEL FORMATTING FOR BUBBLE AND SCATTER CHARTS ARE:

1. Colors
2. Average Lines
3. Quadrant Lines
4. Growth/Share Lines
5. Normative Band
6. Regression Lines

Please refer to the section on Gantt for Gantt chart formatting options.

5.3 Margins

Mekko Graphics gives you the flexibility to customize the look of your chart by adjusting the boundaries of various chart components.

1. Click the Margins button in the Edit Chart toolbar

   Margin boundary lines will appear on your chart. You can adjust your margins by clicking and dragging on the margin handles or by right clicking on the margin and typing in the margin value. Moving margins changes the proportion of space allocated to the different chart components (i.e. charts, grand total, data columns, legend, etc.).

2. Click and drag the handle of the margin to resize up/down or left/right. By clicking and dragging you can add space or reduce space for different elements of the chart, such as data rows and columns, x axis, legends, bar totals, and the chart itself.

3. To turn off the Margin View, click the toggle again.

4. After making margin changes, you can always reset your margins to the default margin setting by selecting Reset **Margins**

5. If you wish to change the default margin settings for all of your charts, you may set Margin defaults in the Preference Manager.

You have two layout options for margins: **Normal** and **Narrow**. Normal margins accommodate for data rows and columns and legends, while narrow margins allocate more space to the main chart area. Set your chart to have normal or narrow margins by clicking the desired layout in the **Margins Layout** dropdown menu in the Edit Chart Toolbar.

5.4 Overview of Color

Mekko Graphics comes installed with several color palettes. A color palette defines the available colors that you may choose for your charts. You can also choose to draw segments according to the cell fill colors in your Mekko Graphics spreadsheet

In addition to the color palette that your chart utilizes, you can also select custom colors for your chart on the fly. You can then apply these colors to either series or segments in your chart and those colors will stay with your chart until you remove them.

If you wish to change either the default colors in your chart and/or the draw order of those colors, you can do so easily through the Preference Manager. In addition to providing the ability to customize your global Mekko Graphics preferences, the Preference Manager also provides the ability to manage multiple Mekko Graphics themes.

The Preference Manager allows you to set color definitions for your charts. In the Preference Manager, you may also create custom palettes (themes) and create custom draw orders. You can edit existing colors by changing the name or RGB value, add new colors, and delete colors from both your draw order and color palette. You can also control whether these draw orders are applied before or after you sort your data in Mekko Graphics charts. Once you are satisfied with your color palette, you can change your chart colors in Mekko Graphics by either segment or series.

Reset Colors

If you wish to reset you chart to the default colors defined in the Preference Manager, you can choose **Reset Colors** from the **Color** drop down menu in the Edit Chart Toolbar. Reset Colors returns all custom colors for all elements in your chart back to their default colors.

Apply Office Theme Colors

Applies the colors and draw order associated with the current Office theme.

Save Chart Theme to File

Takes the theme associated with the current chart and saves it an .xml file

5.5 Chart Colors

Mekko Graphics can automatically color each series of data in the default standard order. Our Multicolor option offers a default multiple color option or you have the option to choose a different theme.

APPLIES TO: ALL CHARTS

TO CHANGE THE COLOR/SHADING OPTIONS FOR YOUR CHART:

1. Right-click in the white space of the chart to access the Format Chart Context Menu and choose the Color Palettes drop-down menu.

2. You may also select your choice from the Color dropdown from the Edit Chart toolbar or Format Chart Task Pane

3. Choose your desired color shading option.

Note: To change your default color definitions for Multicolor or No Shading (one color), or to create your own custom palettes, use our Preference Manager. If you wish to change the colors for a specific series or segment, please see Colors.

COLORING MODE:

You can control whether your colors appear according to your defined multicolor palette before you sort your series, or apply your multicolor palette after you sort your series. You can sort:

By Series Before Sort - the multicolor draw order is applied before the sort is applied.

By Series After Sort - the multicolor draw order is applied after the sort is applied.

By Bars - the multicolor draw order is applied by bar, so every segment in a bar is the same color.

By Segments - each segment inherits a unique color according the multicolor draw order.

For Bubble charts, you can also group your charts by color.

RESET COLORS:

If you wish to reset you chart to the default colors defined in the Preference Manager, you can choose **Reset Colors** from the **Color** drop down menu in the Edit Chart Toolbar. Reset Colors returns all custom colors for all elements in your chart back to their default colors.

CLEAR RECENT COLORS:

If your desired color is not in the palette you have chosen, you can always create a custom color. Custom colors remain in your color selection palette unless you clear them. You may wish to do this to enforce company brands or standards for color. To clear custom colors from your palette, go to the **Color** dropdown menu in the Edit Chart Toolbar and choose **Clear Recent Colors**.

APPLY OFFICE THEME COLORS:

Applies the colors and draw order associated with the current Office theme.

SAVE CHART THEME TO FILE:

Takes the theme associated with the current chart and saves it an .xml file

5.6 Layout

Change the layout/orientation of your charts from vertical to horizontal or vice versa.

APPLIES TO: STACKED BAR, CLUSTER BAR, AND WATERFALL CHARTS

To change the layout of your bar chart, click the **Layout** button in the Edit Chart Toolbar. This will switch the orientation of your chart, but does not alter your data. Any series designated as data rows will be converted to data columns, and vice versa. Applicable enhancements to the chart will be retained upon changing the layout.

In a horizontal chart, you can also choose to switch your Y axis on the top of the chart. From Format Axis, check the checkbox for **Show Primary Axis on Top.**

5.7 Changing Your Chart Type

You have the ability to change/convert one chart sub-type to any other chart sub-type within a chart type. With chart conversion you can convert any given chart X to any requested chart Y (provided they are in the same chart type).

APPLIES TO: ALL CHARTS WITHIN THE SAME CHART TYPE

TO CHANGE CHART TYPES

1. Click the Type button dropdown in the Edit Chart toolbar. Or alternatively, choose Change Chart Type from the Format Chart Context Menu

2. Choose the chart to which you wish to convert. You can only change chart sub-types from within the same chart type. (For example, you can change a Waterfall chart to a Cluster Bar).

Changing between different chart types is permitted but will delete all data and give you a blank chart.

Advanced Tip: If the source chart (the chart you are converting from) contains data that is invalid (e.g. zero or negative values) on the target chart (the chart you are converting to), you will receive a message that some data is invalid and no chart will be drawn.

5.8 Growth Lines

Growth Lines can be used in charts to visualize the difference typically between first to last bar, although it can be between any two bars (or between any two segments for cluster bar charts). The line is drawn from the start bar to the end bar with an arrow pointing in the direction of the growth.

APPLIES TO: STACKED BAR, LINE, WATERFALL,

To insert a Growth Line, go to the Edit Chart toolbar and from the Growth Line menu item, choose Insert Growth Line.

To format your growth line, right click and choose Format Growth Line. This will bring up the **Growth Line Task Pane**. The easiest way to remove a growth line is to simply select it and hit the DEL key.

ADJUSTING A GROWTH LINE

Once a growth line is inserted, you can manually adjust the lines by

1. vertically moving the line itself (by clicking and dragging the line), or

2. moving either the start or end points to a different bar (by clicking and dragging the endpoint of the bar).

CHANGING DIRECTION

To change the direction of a growth line, simply right click the line and choose **Change Direction**. This action will change the boundary points of the line by swapping the start and end points of the line (will draw the arrow on the opposite side of the line). It will also adjust the label value to accommodate the change in line direction.

CALCULATION

To format your growth line calculation, choose **Format Growth Line** from the **Growth Line** button in the Edit Chart Toolbar.

You have the option of displaying the growth line as an absolute calculation or as a CAGR by clicking the appropriate radio button. If you calculate as a CAGR, you can interpret the bars as years by checking the checkbox **Use Bars as Years** in the **Format Chart Task Pane**.

5.9 Bar Comparison Lines

Bar Comparison lines can be used in charts to visualize the difference between pairs of bars or segments. The difference is automatically calculated and updated whenever the underlying data changes. The line is drawn from the start bar to the end bar with an arrow pointing in the direction of the growth.

APPLIES TO**:** STACKED BAR, CLUSTER BAR, LINE, BAR MEKKO, WATERFALL

To insert a Bar Comparison Line, go to the Edit Chart toolbar and from the Bar Comparison menu item, choose Insert Bar Comparison Line.

To format your bar comparison line, right click and choose **Format Bar Comparison Line**. This will bring up the Bar Comparison Line Task Pane. The easiest way to remove a bar comparison line is to simply select it and hit the DEL key.

ADJUSTING A BAR COMPARISON LINE

Once a bar comparison line is inserted, you can manually adjust the lines by

1. vertically moving the line itself (by clicking and dragging the line), or

2. moving either the start or end points to a different bar (by clicking and dragging the endpoint of the bar).

CHANGING DIRECTION

To change the direction of a bar comparison line, simply right click the line and choose **Change Direction**. This action will change the boundary points of the line by swapping the start and end points of the line (will draw the arrow on the opposite side of the line). It will also adjust the label value to accommodate the change in line direction.

5.10 Average Lines

Mekko Graphics includes the ability to add an Average Line. Average lines display the data average for a given chart, drawing a line across the entire chart at the average value point on the Y axis. By default, average line labels are displayed as a combination of the line value and the line title.

There are two types of average lines: Computed and Manual

Computed Average Lines automatically calculate and display the data average for a given chart, drawing a line across the entire chart at the calculated average value point on the Y axis. Note: For 2Y chart types, you have the option of displaying the average line on the Y or 2Y axis. Computed Average lines will automatically recalculate and adjust your average line if your data changes. There can only be one computed line per chart.

Manual Average Lines can be inserted at any point on the Y or 2Y axis.

COMPUTED AVERAGE LINES APPLY TO: STACKED BAR, CLUSTER BAR, LINE, BAR MEKKO CHARTS

MANUAL AVERAGE LINES APPLY TO: ALL CHARTS EXCEPT PIE AND GANTT CHARTS

TO ADD AN AVERAGE LINE

Choose Insert Average Line from Average Line dropdown menu in the Edit Chart Toolbar. You may also right-click in the chart area and from the Format Chart Context Menu, select Insert Average Line.

- If the chart supports computed average lines, the line will insert at the computed average point for the data in the chart. Subsequent insertions will appear as manual lines halfway between the highest line value and the maximum value of the data on the chart. If there are no computed lines on the chart, the line will always be inserted as a computed line.

- For charts that do not support computed average lines, average lines insert at the Y (or 2Y) axis midpoint. Subsequent insertions will place the line halfway between the highest line value and the maximum value of the data on the chart.

- You may also right-click the Y or 2Y axis to insert an average line. Any time you insert an average line from the axis, it is manual and will be placed at the point of insertion

TO REMOVE AN AVERAGE LINE

To remove any average line, simply right-click on the line and select Remove Average Line. You may also click on the Average Line and simply press the DEL key

MODIFYING THE POSITION OF AN AVERAGE LINE

To move an average line, simply click on the line and drag to your desired position on your chart. If the line is computed, moving it will change it to a manual line. Moving the line will automatically calculate the new value according to the new position.

FORMATTING AN AVERAGE LINE

Right click the average line and choose Format Average Line. This brings up the **Format Average Line Task Pane**.

5.11 Vertical Lines

Mekko Graphics includes the ability to add a Vertical Line. Vertical lines draw across the entire chart at any point on the X axis.

VERTICAL LINES APPLY TO**:** all Mekko and Bar charts unless they have a linear axis.

TO ADD A VERTICAL LINE

Choose Insert Vertical Line from the Vertical Line dropdown menu in the Edit Chart Toolbar. You may also right-click in the chart area and from the Format Chart Context Menu, select Insert Vertical Line.

- Vertical lines insert at the X axis midpoint. Subsequent insertions will place the line halfway between the highest line value and the maximum value of the data on the chart.
- You may also right-click the X axis to insert a vertical line. Any time you insert a vertical line from the axis, it will be placed at the point of insertion.

TO REMOVE A VERTICAL LINE

To remove any vertical line, simply right-click on the line and select Remove Vertical Line. You may also click on the Vertical Line and simply press the DEL key.

MODIFYING THE POSITION OF A VERTICAL LINE

To move a vertical line, simply click on the line and drag to your desired position on your chart.

FORMATTING A VERTICAL LINE

Right click the line and choose Format Vertical Line. This brings up the Format Vertical Line Task Pane. Here, you may change the label for the line, as well as the color, line style, and line width.

5.12 Segment Comparison Line

Mekko Graphics includes the ability to add a Segment Comparison Line. Add a Segment Comparison line to visualize the difference between pairs of segments or points.

SEGMENT COMPARISON LINES APPLY TO**:** all MEKKO, LINE and BAR charts

TO ADD A SEGMENT COMPARISON LINE

Choose Insert Segment Comparison Line from the Segment Comparison Line dropdown menu in the Edit Chart Toolbar. You may also right-click in the chart area and from the Format Chart Context Menu, select Insert Segment Comparison Line. By default, the line is drawn from the last segment of the first bar to the last segment of the last bar. You can use the handles that appear to set the two segments that are to be compared. Click the handle at either end and drag and drop to the desired segment.

TO REMOVE A SEGMENT COMPARISON LINE

To remove any line, simply right-click on the line and select **Remove Segment Comparison Line**. You may also click on the line and simply press the DEL key.

MODIFYING THE POSITION OF A SEGMENT COMPARISON LINE

To move a segment comparison line, simply click on either endpoint of the line and drag to your desired position on your chart. You can also adjust the line position while maintaining the position of each endpoint, by dragging the line itself.

FORMATTING A SEGMENT COMPARISON LINE

Right click the line and choose Format Segment Comparison Line. This brings up the **Format Segment Comparison Line Task Pane**. Here, you may change the label for the line, as well as the color, line style, arrow, and line width. To return the line to the default format settings, choose Restore Segment Comparison Line from the Edit Chart Toolbar or the context menu of the line.

5.13 Chart Number Format

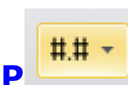
Mekko Graphics offers tremendous flexibility in creating a number formats for all the different label types in your chart. Mekko Graphics provides one place where you can set the format for all your labels.

APPLIES TO: ALL CHARTS

TO SET NUMBER FORMAT

1. Click the Chart icon in the Edit Chart Toolbar, or right click in the chart area to access the **Format Chart Task Pane**

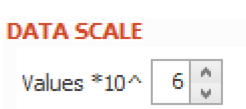
2. In the Values tab of the **Format Chart Task Pane**, you can set numerous formatting options, including displaying your values as a number or percent, thousand and decimal separator, number of decimal places, negative number format, and the ability to display your series name and value on separate lines.

SETTING NUMBER FORMAT PER LABEL GROUP 

Mekko Graphics allows you to set number format per label group. Simply select any label in the group you wish to format, click the **Number Format for Label Group** dropdown in the floater menu. Format the label and that format will be applied to all labels of that group. For example, formatting a bar total label using this tool will automatically format all bar totals in your chart. You can also do this for segment labels, bar total labels, data row/column labels, axis labels, bar labels,

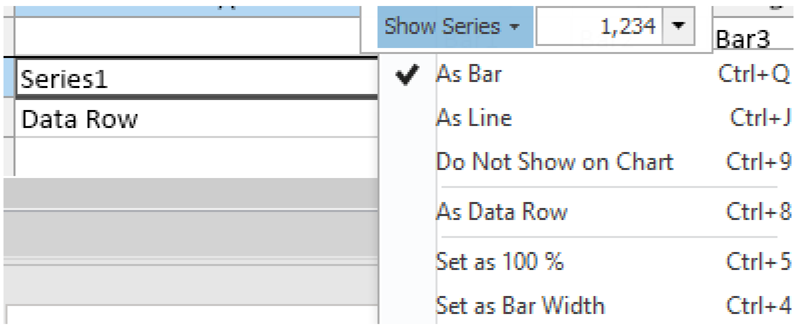
DATA SCALE

Mekko Graphics allows you to alter the exponent value of data in the chart without altering the data itself. This is useful if the values in your data is in, say seven-digit values, but you want to display your data in units of millions. Simply change your data scale to six. You can access the data scale in the **Format Chart Task Pane, Values tab**, or in right click mini-toolbar.



100% CALCULATION

You can choose to calculate your bar total percentage based on a selected series (row). For example, use this if you'd like segment percentages to be based on a target number instead of the bar total. You can designate a 100% calculation row either in the datasheet or in the **Format Chart Task Pane, Values tab** or in right click mini-toolbar



CALCULATED PERCENTAGE

Generally, bar total percentages are calculated from the absolute values, assuming the sum of each bar=100%. The sum of bar total percentages make up the grand total. However, you can calculate it using the value in the selected series as 100% of that bar. Checking this box will use the entire selected row as reference to set the 100% value of every bar.

BAR WIDTH

For Marimekko and Bar Mekko Charts, you can use the Bar Width checkbox to define a series to set as the bar width for the chart. You can designate the width of the bar, either in the datasheet or in the **Format Chart Task Pane, Values tab** or in right click mini-toolbar.

If you wish to change the default number format for all charts, you can do this through the Settings tab in the Preference Manager.

5.14 Gridlines

Mekko Graphics includes the ability to add a gridlines to your chart. Gridlines draw across the entire chart and may be either vertical or horizontal or both, depending on the chart type.

GRIDLINES APPLY TO: ALL BAR, LINE, and BUBBLE/SCATTER charts.

TO ADD GRIDLINES

Check the Gridlines checkbox in the **General** tab of the **Format Chart Task Pane**. You can also add gridlines via the **Format Axes Task Pane** per axis.

FORMATTING GRIDLINES

Go to the **Style** tab of the **Format Chart Task Pane**. Here, you may format the line color, width, and style.

5.15 Spell Check

You may spell-check a chart for the language set in Mekko Graphics. Mekko Graphics calls Microsoft Word's spell-checking function. When the user clicks the spell-check button, Word then launches its spell-check dialog, and completes the spell-check in the language set for that chart.

1. Click on the **Check Spelling icon** in the Edit Chart Toolbar.

2. The Spell Check will execute within Mekko Graphics in the language set for that chart. Therefore, even if a presentation is set to English, a French chart within that presentation can be spell-checked in French within Mekko Graphics. You have the ability to display and modify the language via the toolbar combo box for language. Click the toolbar drop-down for language.

5.16 Quadrant Lines

Quadrant lines are used to create a 2x2 matrix. Mekko Graphics automatically calculates the midpoints of each axis to create the lines. You may also adjust the location of the quadrant lines.

APPLIES TO: X-Y LINEAR BUBBLE AND X-Y LINEAR SCATTER CHARTS

1. Click on **Chart** from the Edit Chart toolbar

2. This brings up the **Format Chart Task Pane**

3. Set the visibility and values/position of your quadrant lines

4. In the **Style** tab of the **Format Chart Task Pane**, you can set the format of your quadrant lines.

5.17 Regression Lines

A regression line is a line drawn through the points on a scatter or bubble chart to summarize the relationship between the variables being studied. Also called a trendline, a regression line is a graphical representation of trends in the group, often used for the study of problems of prediction. The slope represents the degree to which the variables are related. When it slopes down (from top left to bottom right), this indicates a negative or inverse relationship between the variables; when it slopes up (from bottom right to top left), a positive or direct relationship is indicated.

APPLIES TO: ALL BUBBLE and SCATTER CHARTS

1. Click on **Series** from the Edit Chart toolbar

2. This brings up the **Format Series Task Pane**

3. In the **Data Set Groups** tab, indicate for which group you wish to draw your regression line.

4. Also indicate which labels you wish to have included in your regression line: slope, intercept, R2, # of Objects

5. Select the number format (including percent, number of decimal places, and units or currency if applicable) for the regression line. You can also designate which series you wish to display regression, choose the color, line style, and weight of the regression lines.

TOTAL REGRESSION LINE

You can also draw a total regression line where the regression line will include all data sets in the regression. To draw a total regression line, go to the **Format Series Task Pane** and in the **Data Set Groups** section, at the bottom, check the box for **Total Regression Line**.

Note: Bubble charts should have the Group field populated in the datasheet in order to draw a regression line.

5.18 Growth/Share Line

A horizontal growth line is drawn on the Y axis (representing market growth). The vertical share line is drawn on the X axis (representing Relative Market Share). The competitive area is the rectangle formed by the growth line, share line and competitive area line. The growth share matrix highlights companies in relatively strong and relatively weak market positions.

APPLIES TO GROWTH-SHARE CHART

1. Click on **Chart** from the Edit Chart toolbar

2. This brings up the **Format Chart Task Pane**

3. Set the values of your growth/share line

5.19 Normative Band

The normative band is used in the ROS/ROA vs RMS chart and depicts the expected profitability range given a company's relative market share. It is plotted according to the values of your data.

APPLIES TO ROS/ROA VS RMS CHART

1. Click on Chart from the Edit Chart toolbar

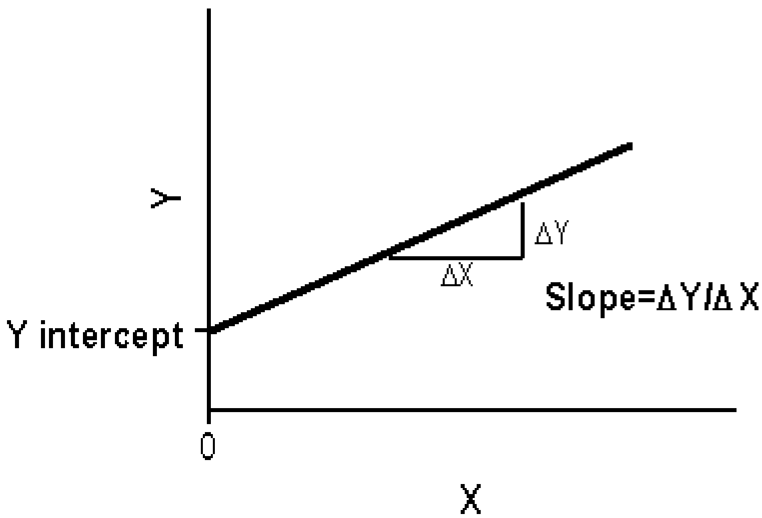
2. This brings up the **Format Chart Task Pane**

3. Set the slope, intercept and band width for your normative band

5.20 Definition of Slope

DEFINITION OF SLOPE

The slope quantifies the steepness of the line. It equals the change in Y for each unit change in X. It is expressed in the units of the Y-axis divided by the units of the X-axis. If the slope is positive, Y increases as X increases. If the slope is negative, Y decreases as X increases.



5.21 Definition of # of Objects

The #of Objects is equal to the number of series being calculated in the regression line.

5.22 Definition of R2

DEFINITION OF R2

R2 is a measure of goodness-of-fit. The value r2 is a fraction between 0.0 and 1.0. An r2 value of 0.0 means that knowing X does not help you predict Y. There is no linear relationship between X and Y, and the best-fit line is a horizontal line going through the mean of all Y values. When r2 equals 1.0, all points lie exactly on a straight line with no scatter. Knowing X lets you predict Y perfectly.

5.23 Definition of Intercept

DEFINITION OF INTERCEPT

The Y intercept is the Y value of the line when X equals zero. It defines the elevation of the line.

5.24 Select Start Angle

You have the ability to select a start angle for a pie or a doughnut chart. If you think of the pie chart as a clock, the default start angle begins at 12:00, so the first series in your spreadsheet will begin at 12:00. You may then change the start angle of the chart which will rotate the drawing of the first series by the number of degrees you specify.

APPLIES TO: PIE CHARTS and DOUGHNUT CHARTS

1. Click on Chart from the Edit Chart toolbar
2. This brings up the **Format Chart Task Pane**
3. Set the value for your start angle

5.25 Set Doughnut Hole Size

You have the ability to set the size of the hole in a doughnut chart.

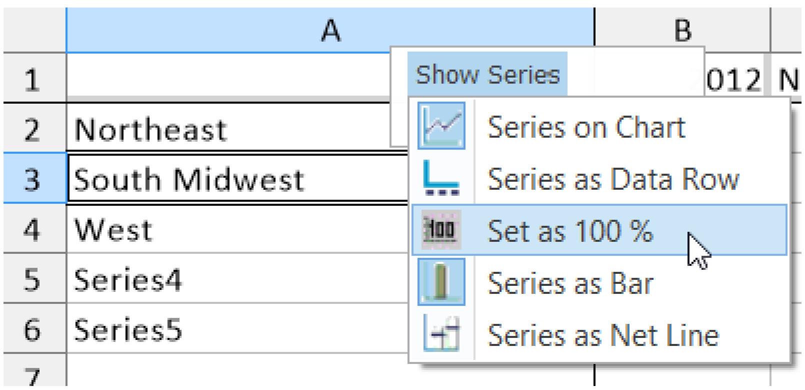
APPLIES TO: DOUGHNUT CHARTS

1. Click on Chart from the Edit Chart toolbar
2. This brings up the **Format Chart Task Pane-->General tab**
3. Set the value for the size of the doughnut hole by adjusting the slider control.

6 Series and Segment Format

6.1 100% Calculation

Specify a row to replace the bar total in calculating segment percentages. For example, use this if you'd like segment percentages to be based on a target number instead of the bar total. For the row you designate to be the 100% calculation row, those values are used to calculate the segment percentages, instead of the bar total. You can designate a 100% calculation row either in the datasheet or in the **Format Chart Task Pane**.



6.2 Colors and Patterns

Many times it is necessary to customize a series color or pattern to make it suit corporate or industry standards. The Mekko Graphics charting system gives you control over shading individual data series or segments within a chart.

APPLIES TO: ALL CHARTS EXCEPT GANTT

CUSTOM COLORING A SERIES

1. Select the segment you wish to color.

2. Right click to display the **Series Context Menu** and choose a color from the Series fill colors dropdown menu. You may also click the **Bars and Series** button in the Edit Chart Toolbar to open the **Format Series Task Pane**. Go to the **Series** tab and **Style** sub tab to set your custom colors for each series.

CUSTOM COLORING A SEGMENT

1. Select the segment you wish to change

2. Right click to display the **Series Context Menu** and choose a color from the Segment fill colors dropdown menu. You may also double click on a segment to open the **Format Segment Task Pane.** The **Format Segment Task Pane** allows you to format series, segments, or bars in one location. It also provides the ability to change several style attributes.

6.3 Data Rows

Mekko Graphics allows you to display series data as a row.

APPLIES TO: ALL MEKKO, BAR, AND LINE CHARTS EXCEPT PIE CHARTS

1. Select the series you wish to display as a data row

2. Right click to display the Series Context Menu

3. Choose Show Series in the context menu and select the desired option

You can also designate a series as a data row directly from the datasheet. Simply right click the desired series name in your datasheet, and from the Show Series drop down menu in the floating toolbar, select Series as Data Row.

You can display an autototal of the data row by checking the **Autototal** checkbox in the **Visibility** tab of the **Format Series Task Pane**.

Sorting Data Rows

To sort the data rows in your chart, go to Format Series task pane, Sort tab and select your sort options for the data rows in your chart. Custom sorting options are also available for data rows.

Tip - To make more room for your data rows, you can simply adjust your chart margins. You can adjust margins by clicking and dragging on the margin handles. Moving margins changes the proportion of space allocated to the different chart components (i.e. charts, grand total, data rows, legend, etc.).

6.4 Display Series as a Line

Mekko Graphics allows you to display one or more series as a line in your chart. The line can display a data series emphasizing change over time or trend. Bar Line charts combine the dynamics of a bar and a line chart.

APPLIES TO: MARIMEKKO, BAR MEKKO, AREA, STACKED BAR AND CLUSTER BAR CHARTS.

TO SHOW A SERIES AS A LINE:

1. Select the series you wish to display as a line
2. Right click to display the Series Context Menu
3. Choose Show Series as Line
4. You can also display the line values by clicking on the Show Labels dropdown and choosing Show Line Values.

You may also choose to display only the line markers for either all or some lines.

6.5 Border and Line Options

Mekko Graphics gives you control over adding borders and lines to individual data series or segments within a chart.

APPLIES TO: ALL CHARTS

TO ADD BORDERS TO ANY SERIES OR SEGMENT

1. Select the segment you wish to change
2. Right click to display the Series Context Menu
3. Choose a border color from the Series Border or Segment Border fill colors dropdown.

6.6 Moving a Series to the 2Y Axis

You can plot series data against a secondary axis (2Y axis). It is helpful to use the 2Y axis when the range of values vary greatly for different data series or when you are showing mixed types of data (e.g. price and volume) where one or more series is plotted against the 2Y axis. A series must be displayed as a line to be plotted on the 2Y axis.

APPLIES TO: MARIMEKKO, BAR MEKKO, AREA, STACKED BAR, CLUSTER BAR, LINE CHARTS

To plot a series on the 2Y axis:

1. Right click the series you wish to plot on the 2Y axis. For some charts, the series must first be plotted as a line before it can be plotted to the 2Y axis.

2. Choose the **Plot on 2Y axis** icon in the Series Context Menu

6.7 Net Lines

Net Lines are used to display the average value based on data entered for a given bar. You can set a net line for either the Y or 2Y axis.

APPLIES TO: WATERFALL, STACKED BAR

1. Select the series you wish to display as a net line

2. Right click to display the Series Context Menu

3. Choose **Show Series as Net Line**

6.8 Other Series

An "other" series designates data from combined sources (e.g. companies representing <2% of product line sales). Data is most often included in this series because it does not provide meaningful information if it were broken down by individual source. By identifying the "other" grouping, Mekko Graphics will automatically default to placing the "other" segment(s) at the top of each bar, no matter how it is sorted. You can also set Mekko Graphics to place your other series at the bottom by checking the box labeled Display Other Series First. This will not affect your spreadsheet.

APPLIES TO: MARIMEKKO, BAR-MEKKO, STACKED BAR, CLUSTER BAR, 100% STACKED BAR, WATERFALL CHARTS

1. Click on the Bars and Series Task Pane

2. Create a new Other series or set an existing series to be an Other Series

3. Select which segments you wish to include in the Other series. You may view the segments by Bars or Series. You may also choose a value, where all segments below the value will automatically be placed in the Other Series. To do this, enter a value in the field labeled Include in Other Series Segmented Values < ___.

6.9 Sorting Series

Sorting your chart data clarifies your chart content and message. Mekko Graphics allows you to sort by bar or series.

APPLIES TO: MARIMEKKO, BAR-MEKKO, WATERFALL, STACKED BAR, 100% STACKED BAR, AND AREA CHARTS

1. Click on **Format Chart Task Pane** and select the **Sort** Tab

2. You can choose to display your series in the order in which it appears on your spreadsheet, with the series listed first in your spreadsheet displaying either on the bottom building up, or starting at the top and building down. Alternatively, you can sort your series as Biggest on Top, Biggest on Bottom, or you can define a custom sort order for your chart. If you select Custom sort, simply drag and drop each series to the desired sort position.

Once you have identified your sort options, you can choose to exclude one or more series from that sort. If you wish to identify one or more series to exclude, go to the **Format Series Task Pane**, Visibility Tab and click the series you wish to exclude. Then choose from the drop menu in the Sort Order column. You can force the series to appear on the top or the bottom, regardless of the sort options chosen in the **Format Chart Task Pane**.

Negative segments appear in the order they appear in the spreadsheet. You can also choose to reverse the order for negative segments in the chart by checking the **Reverse Order for Negative Segments** checkbox in the Sort tab of the **Format Chart Task Pane**.

6.9.1 Bubble Order

You can change the sort order for bubble charts by setting the default for bubble draw order, or you can individually move one or more bubbles to the front or back. To set the chart's draw bubble order, go to the **Sort** tab in the **Format Chart task pane**. You can sort by the series display order in the spreadsheet, or you can choose to sort by biggest in back (default sort). You may also define a custom sort for your bubbles.

If you want to move one or more bubbles to the front or the back, right click on either the bubbles or their associated bubble labels and choose **Move to Front** or **Move to Back.** You may also designate a custom bubble order via the Format Series task pane.

6.10 Link All Segments

Linking all Segments with connector lines allows you to easily view the change in series values across the chart. Mekko Graphics lets you automatically add dashed comparison lines between segments in a bar chart.

APPLIES TO: WATERFALL, STACKED BAR, 100% STACKED BAR CHARTS.

Click the Link all Segments icon in the Edit Chart Toolbar to automatically add connector lines to all segments in your chart.

If you wish to add links to only a subset of segments, click the segment where you want a link to be drawn. Green dots display the allowable segment link points. Click and drag from your starting point to ending point, drawing the segment link from one green dot to another. A green dot will indicate an allowable ending point based on your starting point. Continue drawing your segment links until you are satisfied with your chart.

You can also turn off the segment link mode in order to make it easier to select very small segments without selecting the link marker. To do this, choose **Disable Link Connectors** from the **Link All Segments** drop down menu.

FORMAT SEGMENT LINKS

Right click on a segment link to change the line width, color and pattern of the line. You can set the default width of your segment links in Preference Manager for all charts.

TO REMOVE SEGMENT LINKS:

You may remove individual segment links by right clicking on the link you wish to remove and choosing **Remove Segment Link** from the context menu. You may also remove all segment links by deselecting the **Link All Segments** button in the Edit Chart toolbar. You may remove any manual segment links by choosing **Remove Manual Segment Links** option from the drop down menu in the Edit Chart toolbar.

6.11 Show Markers only

APPLIES TO: MARIMEKKO, BAR MEKKO, AREA, LINE, STACKED BAR, AND CLUSTER BAR CHARTS.

For charts where displaying a series as a line, you have the option to show the line values and/or simply show the markers without the line. If you wish to show only the markers for all lines in your chart, to the **Format Chart Task Pane**, and in the **General** tab, click the checkbox **Show Line Values**. If you want to display the values only, and not the line, go to the Misc section, and check the checkbox **Line Markers Only**.

If you wish to show markers for only one line(s) in the chart, you can double click the line and in the **Format Segment task pane** check the **Use Markers Only** checkbox.

6.12 Show Lines - Connecting Scatter Data Points with Lines

Mekko Graphics gives you the ability to connect data set points with lines on scatter charts. This feature allows you to put all the dots into perspective, usually by identifying trends or showing relationships.

APPLIES TO: ALL SCATTER CHARTS

1. Click on the Series Task Pane

2. Click the Lines checkbox for the data set you wish to connect with lines

6.13 Hide/Show Series

Mekko Graphics allows you to hide series in your chart.

APPLIES TO: ALL CHARTS

1. Select the series you wish to hide

2. Right click to display the Series Context Menu

3. Select Show Series from the context menu, and choose Hide Series from the submenu

You may also

1. Click on the **Bars and Series Task Pane**

2. Uncheck the Chart checkbox for any series you wish to hide

6.14 Outlier Series

An outlier series is an extreme deviation from the mean or a value far from most others in a set of data. An outlier represents a measurement that does not appear to follow the characteristic distribution of the rest of the data. These may be genuine properties of the data, or be due to measurement error or other anomalies. In order to best demonstrate the message of the chart, you may wish to designate a data point(s) as an outlier. Doing so will automatically adjust your chart scale according to the remaining data. The outlier will be placed on the nearest axis. And, an arrow will be placed next to the outlier indicating the direction of its true value.

APPLIES TO: ALL BUBBLE CHARTS

1. Click on the **Format Series Task Pane**

2. Set one or more bubbles as an outlier.

The outlier will be placed on the nearest axis, with an arrow placed next to the outlier indicating the direction of its true value.

6.15 Highlight Series

Highlight Series allows a user to call attention to one or more series in a pie chart by pulling that series out from the pie or doughnut chart.

APPLIES TO: PIE CHARTS and DOUGHNUT CHARTS

1. Click on the **Format Series Task Pane** and the Visibility tab

2. Set a series to be highlighted by checking the desired checkbox(es)

7 Editing Labels

7.1 How to resize a label

1. Select the label(s) you wish to resize
2. Right click to display the Label Context Menu.
3. Choose the increase/decrease font size button or type in a font size in the font size text box

7.2 How to select multiple labels at once

Hold down the CTRL or SHIFT key to select multiple labels, and apply an attribute to more than one label. You can also hold down your mouse key and drag to create a "lasso" around several labels to select several labels at once.

7.3 How to change alignment or justification of a label

1. Select at least two labels you wish to align
2. Right click to display the Label Context Menu.
3. Choose the desired alignment or justification option

7.4 How to change orientation of a label

1. Select the label(s) you wish to change
2. Right click to display the Label Context Menu.
3. Choose the desired orientation

7.5 How to hide a Label

1. Select the label(s) you wish to hide
2. Right click to display the Label Context Menu.
3. Choose Hide

7.6 How to edit a label

1. Select the label you wish to edit
2. Double click the label
3. Edit the text
4. Click off

Note: Labels that have been edited by changing the text of the label will have a red border around them in Mekko Graphics, indicating that label has been manually changed by the user.

7.7 How to move a label

Select the label(s) and click and drag to the desired new location. By default, an annotation line drawn from the label to its home segment. If you wish to turn this off, click the annotation line toggle in the Label Context Menu. Moved labels have blue handles around them, indicating they have been moved.

7.8 How to change the attributes of a label

1. Select the label(s) you wish to modify
2. Right click to display the Label Context Menu
3. Choose the label attributes you wish to apply (i.e. bold, italic, underline, etc.)

7.9 How to change the color of a label

1. Select the label(s) you wish to color
2. Right click to display the Label Context Menu.
3. Choose the color from the Label Color drop down

If your desired color is not in the palette, you can choose a custom color by clicking More Colors, and choosing RGB, HSL or HEX conventions, or choosing a color manually though a color wheel.

7.10 How to adjust line spacing in labels

For multi-line labels, you have the option to adjust the default line spacing between the lines of the label.

To Adjust the line spacing:

1. Double click the label you wish to adjust. The label will be highlighted.

2. With the text selected, right click and type in your desired value in the **Text Lines Spacing/Squeezing** in the floater menu. Increasing the value will widen the space between lines. Decreasing the value will squeeze the space between lines.

7.11 How to change the background color of a label

When labels are placed against patterned backgrounds, it might be difficult to read the label. Mekko Graphics provides three options for coloring the base background of the label to improve readability.

For Bar and Bubble charts, the three options are White, Transparent, and Colored. For Gantt charts, the options are Opaque, Colored and Transparent.

Changing the Background Color of a Label

To change the label's base background color, right click on a label against a patterned background, and select your choice from the Label Background menu. The Colored option will color the label background to match the dominant color in the pattern.

8 Bar Level Formatting

8.1 Hiding Bars

Mekko Graphics allows you to hide bars in your chart.

APPLIES TO: ALL BAR CHARTS EXCEPT PIE AND AREA CHARTS

1. Click on the Bars/Series button in the Edit Chart Toolbar
2. Click on the **Bars and Series Task Pane**
3. Uncheck the Chart checkbox for any bars you wish to hide

8.2 Total Bars

Waterfall charts can be used to categorize revenue or cost components of a market segment. Each bar is related to and effected by surrounding bar values. Given the first bar value, the next bar adds or subtracts it to the second value, and so on. You can create or designate a bar (or multiple bars) as a total bar, which is the sum of the intermediate bars in the chart.

APPLIES TO: WATERFALL CHARTS

1. Right click on the bar you wish to be a total bar. This will display the Format Bars Context Menu
2. Choose Set Bar as Total
3. You can also go to the Format Bars/Series Task Pane and set your desired bar as a total bar

8.3 Set Previous Bar

Waterfall charts can be used to categorize revenue or cost components of a market segment. Each bar is related to and effected by surrounding bar values. Given the first bar value, the next bar adds or subtracts it to the second value, and so on. Typically, the bar will use the previous (adjacent) bar as its previous bar. You can designate a different bar to use as a previous bar.

APPLIES TO: WATERFALL CHARTS

1. Right click on the bar you wish to set a previous bar for.

2. Choose **Set Previous Bar** and select a previous bar from the available options in the drop down menu. If you are linking segments, the links will reference the bar you have designated as the previous bar.

8.4 Data Columns

Mekko Graphics allows you to display bars as a standard data column or as a CAGR column.

APPLIES TO: ALL BAR CHARTS EXCEPT PIE CHART

NOTE: HORIZONTAL CHARTS DISPLAY THIS FUNCTION IN FORMAT > SERIES DIALOG BOX AND DO NOT HAVE A CAGR OPTION.

TO DISPLAY YOUR BARS AS A DATA COLUMN OR CAGR

1. Click on the Bars/Series button in the Edit Chart Toolbar

2. Click on the **Bars and Series Task Pane**

3. You have three checkboxes for each bar. Choose the appropriate options in accordance with how you would like your data to appear. You may choose to display data as both in the chart and as a data column if desired.

    a. Chart - the default setting is to display all bars in your chart.

    b. Data - displays your bar as a column to the right of your chart.

    c. CAGR - displays your bar as a CAGR to the right of your chart.

You may also designate a bar as a data column or CAGR in the datasheet. Simply right click on the desired bar column header and from the Show Bar drop down menu in the floating toolbar, select Bar as Data Column or Bar as CAGR column. You can display an autototal of the data column or CAGR by checking the **Autototal** checkbox in the **Visibility** tab of the **Format Bars Task Pane**.

8.5 CAGR

CAGR (Compound Annual Growth Rate) values represent a series rate of change over time. Its value is the year-over-year growth rate applied to an investment or other part of a company's activities over a multiple-year period. The formula for calculating CAGR is (Current Value/Base Value) ^(1/# of years) - 1.

CAGRs are displayed as a data column to the right of the chart. The CAGR formula calculation is now supported by Mekko Graphics and is

=CAGR(BeginAMT, EndAMT, Years)

8.6 Bar Widths

You can specify a particular row in your spreadsheet to be used as the bar width for your chart.

APPLIES TO MARIMEKKO AND BAR MEKKO CHARTS

1. Click on the Bars/Series button in the Edit Chart Toolbar
2. Click on the **Bars and Series Task Pane**
3. The Widths drop down menu contains all the spreadsheet rows in your chart. You can create and select a specific row from the spreadsheet to set the bar widths. Alternatively, the width can be set to automatic.

You may also set a bar as the bar width directly in the datasheet. Simply right click on the desired bar column header and from the Show Bar drop down menu in the floating toolbar, select **Bar as Width**.

8.7 Bar Labels

You can customize the sequence of (X axis labels) bar labels you wish to display on your bar and area charts and format your Bar Totals.

APPLIES TO: ALL BAR CHARTS EXCEPT PIE CHART

1. Click on the Bars/Series button in the Edit Chart Toolbar
2. Click on the **Bars and Series Task Pane**

3. Choose an "Nth" value that will display your desired sequence of bar labels

You can also choose to show every "Nth" bar label via the Format Axes task pane and on the right click of the X axis.

8.8 Gaps and Clusters

You can customize the width between bars (gaps) to create a desired effect.

APPLIES TO: STACKED BAR, CLUSTER BAR, 100% STACKED BAR, WATERFALL CHARTS.

TO CHANGE BAR GAPS

Click the X axis. You will see a handle in between the bars which you can use to drag and drop the gap to your desired width. If you drag the gap past the right border of the adjacent bar, Mekko Graphics will add a placeholder bar to the chart.

You can also set the bar gap manually.

1. Click on the Bars/Series button in the Edit Chart Toolbar

2. Click on the **Bars and Series Task Pane** and click the Bars tab, Options subtab, and you can type in a value in a value to define as your bar gap.

3. Enter a value to change your gap width from the automatic default width.

TO CHANGE BAR CLUSTERS - CREATING A STACKED CLUSTER BAR CHART

You can use the Quick Launch to create a Stacked Cluster Bar, or you can change any stacked bar to a stacked cluster bar by editing the Cluster by: field.

1. Go to the **Format Bars and Series Task Pane**, and click the Bars tab, Options subtab.

2. To change the cluster value, type in the number of bars in Cluster By: field.

8.9 Sorting Bars

Sorting your chart data clarifies your chart content and message. Mekko Graphics allows you to sort by bar or series.

APPLIES TO: MARIMEKKO, BAR-MEKKO, CLUSTER BAR, STACKED BAR, 100% STACKED BAR, WATERFALL CHARTS

1. Click on **Format Chart Task Pane** and select the **Sort** Tab

2. You can choose to display your bars in the order in which it appears on your spreadsheet, where the first bars appear on the left and move right, or vice versa.   Other sorting options allow you to sort your data with the highest bar on the left or highest bar on the right.

3. In the case of Marimekko and Bar Mekko charts, you have additional sort options, where you can sort with the Widest Bar on the Right or Widest Bar on the Left.

4. Alternatively, you can define a custom sort order for your chart. If you select Custom sort, simply drag and drop each bar to the desired sort position.

Once you have identified your sort options, you can choose to exclude one or more bars from that sort. If you wish to identify one or more bars to exclude, go to the **Format Bars Task Pane**, **Visibility** Tab and click the series you wish to exclude. Then choose from the drop menu in the **Include in Sort** column. You can force the bar to always appear on the left or the right, regardless of the sort options chosen in the **Format Chart Task Pane**.

WATERFALL CHART BAR SORT

Waterfall charts have additional sorting options and new concepts. They are defined below.

Start Bar - In a Waterfall chart, you can have one or more Start bars. A Start Bar is defined as the first bar of a chart, or any bar in the chart that has no previous bar.

Chain - In a Waterfall chart, a chain is defined as a collection of bars that are internally linked by their start and end bar. It is possible to link any bar to more than one chain.

For Waterfall charts, sorting is always between the start bar and the total of that chain, and the sort applies to all chains. The following rules apply:

1. Total bars are always excluded from sort
2. Bars are always sorted by their net values
3. There are three sort options:
    a. Biggest on left – first up, then down
    b. Biggest on right – first down, then up
    c. Spreadsheet order
4. Sorts include the ability to include or exclude the first bar
5. In the instance where bars belong to two Waterfall chains, the chart cannot be sorted.
6. If you exclude a bar to always appear on right, the excluded bar should always display before the total bar ending that particular chain.

9 Axis Formatting

9.1 Axis Breaks

Axis breaks can be used to shrink a particularly large segment and enhance readability for the smaller segments in your chart.

Any break you insert applies to the axis and to all segments sharing the same range of the axis. Axis breaks can be applied to a Y or a 2Y axis.

For a bar chart, the boundary between segments of a bar cannot fall within an axis break. For a scatter chart, none of the points can be within the break, and for a line or area chart, none of the vertices can be within the break (although the lines connecting vertices can cross a break). For a bubble chart, the break will only display on the axis, not on the bubble.

The size of the break will always be set to the maximum size that it could take up without violating one the above rules. Therefore, changing the data after a break has already been created, could cause the break to grow, shrink or move to meet the above requirements. If that modification would cause the break to fall completely outside the data range, or cause the size of the break to be extremely small, the break will be removed entirely.

On a 2Y chart, the breaks for the Y and 2Y axes are independent of each other. Break placement for Y axis will be based only on series data relating to the Y axis. And a break on the 2Y axis will be based on data plotted on the 2Y axis. In other words, data for series on the 2Y axis could have a boundary in the middle of a break in the Y axis.

ADDING AN AXIS BREAK

To add an axis break, right-click the part of the segment or axis where you want the break to be inserted, and choose Insert Axis Break from the Format Axis Context Menu.

When adding an axis break, the exact position where you right-click a segment or axis determines where the break will be inserted. After you insert the break, hovering your mouse on the break will provide you with the upper and lower boundary of the break.

A break can only be added if it is determined that the break is not too small relative to the axis scale. If it is determined to be too small, you will not be permitted to add the break.

ADJUSTING AN AXIS BREAK

You can adjust the size of the break by right-clicking the break and choosing Resize.

Also, you can resize a break by simply dragging the lines that appear when you select the break. These lines mark the range of the compressed scale. Drag the lines to determine the size of the compressed part of the scale.

There are two types of break styles: a wavy line and a diagonal line. Choose the desired style for your chart.

To remove an existing axis break, right click on the break and choose Remove Axis Break.

CUSTOM AXIS BREAKS

When you insert an axis break, Mekko Graphics calculates the parameters of that break based on your data. You can set custom boundaries for your axis break within the limits of the break by right clicking on the break and setting custom minimum and maximum values for the break's boundaries (the start and end value of the axis break). The minimum value of the new axis break cannot be less than the min value of the original axis break. The maximum value of the new axis break cannot be greater than the maximum value of the original axis break.

1. To set a custom axis break, first insert a standard axis break.

2. Right click on the break

3. In the context menu, set the desired minimum and maximum value of the axis break.

4. You can also reset back to the calculated value. (The calculated value = the value in the original axis break).

If you are not sure if a break is manual or calculated, you can determine by color. A manual break will have a red color.

9.2 Axis Appearance

You can change the appearance of your axes in Mekko Graphics by formatting axis labels, lines, tick marks, or the entire axis itself.

APPLIES TO: ALL CHARTS EXCEPT PIE CHART

1. Click on the Axes button in the Edit Chart toolbar

2. For each of your axes: Y axis, X axis, 2Y axis (for 2Y charts only), indicate your preferences by checking the desired checkboxes.

SHOW PRIMARY AXIS ON THE RIGHT

You have the option to designate the primary (principal) Y axis to display either on the left or on the right.

To move the primary axis to the right side of the chart, choose **Show Primary Y Axis on right** checkbox from the Format Axis task pane. You will also see this option on the right click of the axis in the **Format Axis Appearance** dropdown menu. (For horizontal charts, it is called "Show Primary Y axis on top"). If you move a primary axis to the right or to the top, all its line properties (tick marks, line visibility, color, width) will be retained.

If there is already a secondary axis, it will be placed on the left automatically.

REVERSE X AXIS

APPLIES TO: WATERFALL, CLUSTER, BUBBLE, SCATTER, AREA, and LINE charts

You have the option to change the direction of the X axis.

To switch or reverse the X axis, go to the **Layout** drop down menu in the Edit Chart toolbar and choose **Reverse X Axis**. This function is also available in the Format Chart task pane, Layout section.

SHOW AXIS BEHIND BARS

You have the option to display the X axis behind any overlapping bars or bubbles. This will draw the bubble or bar in front of the axis line. To do this, right click on the X axis, and from the floater menu, chose Draw in Background.

9.3 Axis Scales

Mekko Graphics allows the capability to change the axis scales for both bar/area/line and bubble/scatter charts. They can be automatic or manual.

APPLIES TO: ALL CHARTS EXCEPT PIE AND GANTT CHART.

1. Right click on the Axis and choose Format Axes from the Axis Context Menu

2. The default scale is computed, meaning that Mekko Graphics computes the scale based on your data and the type of chart you are creating. However, you may customize your axis scale by clicking the Manual Scale radio button. Once you click the Manual Scale button, the minimum, maximum, and tick interval fields become enabled, allowing you to enter values. The values are defaulted to the computed values for that chart.

Select the minimum and maximum axis value as well as the tick interval (the interval between axis values displayed).

Reference Bubble - Allows you to format the relative scale of the reference bubble. You may select the default calculated value or choose a manual value for the reference bubble. You may also choose to hide the reference bubble in your chart, or simply hide the label.

You may also perform the same functions by clicking the Axis button in the Edit Chart toolbar

10 Labels

10.1 Label Defaults

Use Blank Series/Bars Names:
You have the option to display series and bar data in the absense of the series or bar name in the data. Bars and series appearing in your datasheet without a corresponding series or bar name will still appear on the chart. This option can be set in the Preference Manager, or be set at the chart level in the **Format Chart Task Pane**.

Place All Labels:
You have the option to display all the labels in your chart (no labels will be unplaced). Labels that would typically not fit in your chart will smartplace at the smartplace font size you have defined in the Preference Manager. This option can be set in the Preference Manager, or be set at the chart level in the Format Chart Task Pane.

10.2 Overview of Labels

It is important to have the ability to customize your chart's look in order to communicate information effectively. Mekko Graphics gives you tremendous control and flexibility with your chart labels, allowing you to build eye-catching, effective charts that give a compelling message. Labels on your chart are broken down into four different types:

1. Series labels - includes all labels pertaining to series data
2. Bar Labels - includes all labels pertaining to X axis, or bars
3. Total Labels - includes both bar total and grand total labels
4. Misc. Labels - includes all axis labels, data column/row labels, adornment (i.e. growth line labels, bar comparison line labels, segment comparison line labels, vertical line labels, etc)

With Mekko Graphics you have various label view options and can change those options with a click of a button.

An important feature of Mekko Graphics is its built-in Label Manager. The Label Manager lists the status of every label in your chart giving you maximum control over each label.

If you do not wish to have any labels be unplaced in your chart, there is an option to Place all Labels. This option can be found in the Preference Manager as a default setting for all charts, as well as in the Format Chart Task Pane for each chart.

There is also an option to draw bars and series data even when there is no corresponding bars or series label in the spreadsheet. Use Blank Series/Bars Names checkbox can also be found in the Preference Manager as a default setting or in the Format Chart Task Pane for each chart.

10.3 Label Formatting

Mekko Graphics provides several label formatting options, enabling you to customize your chart's labels and better display your data. These options are available in the context (right-click) menu and the floating toolbar when you right click a label.

LABEL DISPLAY

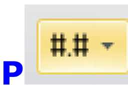
The right click menu allows you to show or hide labels. To hide a label, click on the label(s) and choose Hide. If you wish to show it again, you must choose Show via the Label Manager. You may also select a label and click DEL to remove a label from the chart.

SELECT ALL SIMILAR LABELS

Mekko Graphics makes it easy to select multiple labels at at a time. If you wish to apply an attribute to more than one label, hold down the Ctrl key to select more than one label, then right click and choose the desired function. If you wish to select all labels of one type (e.g. bar labels, series labels, bar totals, or axis labels), you can simply right click on one label and choose **Select all Similar Labels**.

FORMATTING LABELS

You have several formatting options for your labels. Right click a label to explore all of your formatting options, including resizing, editing, changing font color or typeface, changing orientation and justification, changing the line spacing of multi-line labels, and other label attributes including number formatting.

SETTING NUMBER FORMAT PER LABEL GROUP 

Mekko Graphics allows you to set number format per label group. Simply select any label in the group you wish to format, click the **Number Format for Label Group** dropdown in the floater menu. Format the label and that format will be applied to all labels of that group. For example, formatting a bar total label using this tool will automatically format all bar totals in your chart. You can also do this for segment labels, bar total labels, data row/column labels, axis labels, bar labels,

10.4 Label Manager

Think of the Label Manager as the control panel of your chart. The Label Manager lists the status of every label in your chart giving you maximum control over the placement of each label. Below you will find sections on the following:

Four Categories of Labels in the Label Manager

Label Manager Statuses

Label Manager Display

How to Work with the Label Manager

APPLIES TO: ALL CHARTS

FOUR LABEL CATEGORIES IN LABEL MANAGER:

Labels on your chart are broken down into four different types, which correspond to the four different tabs displayed at the bottom of the Label Manager:

1. Series labels - includes all labels pertaining to series data

2. Bar Labels - includes all labels pertaining to X axis, or bars

3. Total Labels - includes both bar total and grand total labels

4. Misc Labels - includes all axis labels, data column/ row labels, average line labels, growth line labels, bar comparison line labels, net line labels, and legend labels

Tip: If there are any unplaced labels in any of the four tab categories, the category name will display as red.

POSSIBLE OPTIONS FOR "STATUS" IN LABEL MANAGER:

The following categories comprise a comprehensive list of all the possible statuses that may display for any given label.

1. Placed - the label is placed as initially drawn on the chart

2. Unplaced - the label does not fit on the chart as initially drawn and does not display on the chart, but is displayed in the Label Manager.

3. Resized - the user has manually changed the font size of the label

4. Edited - the user has manually edited a label (includes Bold, Italic, Underline, font typeface change, font color change, strikeout, double underline, inplace editing, rotation, and slant)

5. Moved - users have the ability to move a label by selecting it with the mouse and dragging it to a new location.

6. In Other - the label has been placed in an other series. The Label Manager also allows segment labels to have their corresponding segments be added to the series deemed as the "other" series. A segment label in any state can be added to the other series. Once a segment is part of the other series (unless it is the other series), its label is no longer displayed and its status becomes "In Other". The label manager also provides the affordance to remove a segment from the "other" series.

7. SmartPlaced - the user has taken an unplaced or annotated label and SmartPlaced it on the chart. SmartPlace is a Mekko Graphics technology that intelligently positions a label in its home segment of the chart at the lowest possible font size ensuring it will display on the chart. When a label is SmartPlaced, the label manager first attempts to fit the label in its desired location. If the label fits, its status becomes placed. If the label does not fit, progressively

smaller fonts are attempted down to the SmartPlace minimum font size parameter, and its status becomes SmartPlaced. If the label still does not fit, it overlaps its bounding rectangle, and its status remains SmartPlaced.

8. Annotated - the user has chosen to annotate (place a label outside its home segment with a line drawn from the label to its home segment) a label on the chart. The process of annotation involves calculating an alternate position for a label based on the white space that remains after all the placed and SmartPlaced labels have been placed. An annotated label is then positioned in one of these alternate positions An annotation line, or “flamingo”, is then drawn from the label to its home segment. If an alternate position can be calculated for this label, the label’s status becomes annotated. If no alternate position can be calculated, the label remains unplaced.

There are two types of annotation lines in Mekko Graphics.

a. Labels which are annotated from the Label Manager

   To use them, select unplaced labels in the label manager and select Annotate or Annotate All Unplaced from the right-click menu. Once the option has been selected, the label will change its state to Annotated. In this state the system will automatically respond to any data change by reevaluating the label's position and the appearance of the annotation lines. This is only applicable to Segment labels.

b. Labels that were moved and have an annotation line to their original location

   To use them, simply move a label away from its base location. The label state is changed to Moved (manual) and not Annotated. When data changes the label will act as a manual label which means no automatic adjustment will be made to it. This option applies to Segment Labels, Bar Labels and Bar Total Labels.

9. Hidden - the label has been hidden from view on the chart

LABEL MANAGER DISPLAY

You can customize the label manager display to suit your needs. Each column in the Label Manager is sortable. To sort by a particular column, such as Bar in the example below, click on the title bar for that column. The indicates that column is a sort key.

Additionally, you can filter by status, which will display only the status filtered. Click the down arrow in the Label Manager title bar and choose the status on which you want to filter.

Sometimes a label will have more than one status (for example, a label could be 'resized' and 'moved'). The following list outlines the hierarchy that determines which label to display if more than one action has been applied to a label.

1. Moved
2. Edited
3. Resized
4. SmartPlaced/Annotated. (These are mutually exclusive)
5. Placed

For example, if a label is resized and moved, the Label Manager will display "Moved" in status field. If the label is SmartPlaced and Edited, the Label Manager will display "Edited".

If a label is "Hidden", "In Other" or "Unplaced" that status will display regardless of any previous actions that might have been performed on that label.

HOW TO WORK WITH THE LABEL MANAGER

You can select any label you see listed in the label manager. Click on the appropriate tab to select a label or multiple labels (though control-click). There is a rich right-click functionality through the Label Manager. You can right click on a label and all applicable actions for that label can be selected.

Below is a table which outlines all the possible actions for each label state, and their possible resulting state.

Initial Label State	*Possible Operation*	*Resulting Label State*
Placed	Edit	Edited
	Move	Moved
	Add to Other	In Other
	Restore	Placed or Unplaced
	Hide	Hidden
Unplaced	Move	Moved
	SmartPlace	SmartPlaced
	Add to Other	In Other
	Annotate	Placed, annotated, or unplaced
	Restore	Placed or Unplaced
SmartPlaced	Edit	Edited
	Move	Moved
	Add to Other	In Other
	Annotate	Placed, Annotated, or Unplaced
	Restore	Placed or Unplaced
	Hide	Hidden
Moved	Edit	Moved
	Move	Moved
	SmartPlace	SmartPlaced

	Add to Other Annotate Restore Hide	In Other Placed, Annotated, or Unplaced Placed or Unplaced Hidden
In Other	Remove from Other	Placed or Unplaced
Annotated	Edit Move SmartPlace Add to Other Restore	Edited Moved SmartPlaced or Placed In Other Placed or Unplaced

10.5 Label Views

Mekko Graphics gives you a wide variety of ways to view labels on your chart.

Click on the Show Labels dropdown in the Edit Chart Toolbar.

The options are as follows:

Show All - shows all the labels in every bar

Hide All - Hides all labels in all bars. The Label Manager will display all series labels as hidden.

Show First Bar Only - shows only those labels in the first bar. The Label Manager will display all other series labels as hidden.

Show Last Bar Only - shows only those labels in the last bar. The Label Manager will display all other series labels as hidden.

Series Name Only - shows only the series labels, but not the values of the labels

Values Only - shows only the values of the labels, but not the series labels

Calculated Percentage Only - shows only the percentage value for the label

Name and Value - shows both the series label and the value of the label

Name and Percentage - shows both series labels and their values on the chart

Value and Percentage - shows the value and the calculated percentage of the label

Name, Value and Percentage - show the name, value and calculated percentage of the label

Show Line Segment Values - shows the values of the segments of the series shown as lines

---

10.6 Annotation Lines and Labels

Segment labels also have the ability to be annotated. Annotation means that Mekko Graphics calculates an alternate position for a label and then places the label in one of these alternate positions. An annotation line, or “flamingo”, is then drawn from the label to its home segment. If an alternate position can be calculated for this label, the label’s status becomes 'annotated'. If no alternate position can be calculated, the label remains unplaced.

There are two types of annotation lines in Mekko Graphics:

1. Labels which are annotated manually (via right-click) or the Label Manager

   To use them, select unplaced label(s) in the Label Manager and select either Annotate or Annotate All Unplaced from the right click menu. It is also possible to select a smartplaced label from the Label Manager and select Annotate.

You may also do this by right-clicking on a smartplaced label in the chart. Once the option has been selected, the label will change its state to Annotated. In this state the system will automatically respond to any data change by reevaluating the label's position and the appearance of the annotation lines. Annotation from the Label Manager is only applicable to Segment Labels.

2. Labels that have been moved and have an annotation line to their original location

   To manually annotate a label, simply move a label away from its base location. The label state is changed to 'Moved' (manual) and not 'Annotated'. When data changes, the label will act has a manual label which means no automatic adjustment will be made to it. This option applies to Segment Labels, Bar Labels and Bar Total Labels.

ANNOTATION LINES TOOLBAR BUTTONS

1. Show/Hide Annotation Line: Turn annotation line on\off for selected labels.

2. Smart Annotate Selected Labels: Try to annotate a group of labels in the most efficient way. Applies to segment labels.

3. Increment Annotation: Increases the distance of the annotation line from the label.

4. Decrement Annotation: Decreases the distance of the annotation line from the label.

Pie Charts and bubble charts are special in the way annotation lines are implemented. In a pie chart, the annotation line will always be drawn to a fixed point on the pie’s arc. In a bubble chart the annotation line will be drawn to the closest point on the bubble.

10.7 Inplace Edit

One way to edit a label is by inplace editing. Inplace editing allows you change the text of any label on your chart without changing the text in the spreadsheet. This is a very useful tool in the event that you do not want your original data to change, but you wish to change display of your labels on the chart. Once you inplace edit a label, red handles will appear around the label while in Mekko Graphics informing you that the label has been edited.

APPLIES TO: ALL CHARTS

TO INPLACE EDIT

1. Double-click the label you wish to edit. This places you in edit mode, and allows you to change the text of the label.

2. Edit your text.

3. Right click to utilize the formatting options available for either part or all of your label, including changing the line spacing of multi-line labels

4. Once the label is edited, the label status becomes Edited in the Label Manager

11 Legends

11.1 Legends

Mekko Graphics offers the ability to show your labels as a legend, and provides flexibility in the placement and look of your legend.

APPLIES TO: ALL CHARTS EXCEPT GANTT CHARTS

SHOWING THE LEGEND

1. Click in the Legend dropdown menu in the Edit Chart toolbar and choose **Show/Hide Legend**.

2. If all legend items do not fit, you have several options to ensure the items fit, including changing the position of the legend, increase the size of the legend area (either horizontally or vertically) and Mekko Graphics will fit items in this new area.

   To hide the legend, simply de-select Show/Hide Legend. All legend items will always have the same font size

3. If there are too many legend items to fit in the defined legend area, the last items (text and key) will not be displayed and the legend item will be unplaced in the label manager

11.2 Formatting your Legend

Mekko Graphics provides many options for formatting your legend. These include changing legend position, layout, font size, appearance, item order, color, and hiding and showing legend items.

APPLIES TO: ALL CHART TYPES

1. Click on the Legend button in the Edit Chart Toolbar

2. Click the Legend drop down and choose Format Legend. This displays the Format Legend Task Pane allowing you to format your legend item order, visibility and legend labels.

3. The default legend position is Lower Right, which displays as a single column on the right hand side of the chart. you can choose one of the predefined legend positions including:

- Lower Right
- Upper Right
- Spread Right
- Align to CAGR (if CAGR column in chart)
- Align to Last Bar
- Top
- Bottom
- Lower left

  Each position will come with a default alignment (left, middle, right, and justify) which can be changed. You can also drag and drop the entire legend to any desired position. If you move or manually resize the entire legend, its position becomes manual.

4. To create a multi-row or multi-column legend, select the legend box and drag to resize it.

11.3 Options for Handling Unplaced Legend Items

Mekko Graphics provides numerous options for dealing with legend items that become unplaced.

1) Choose a different legend position

   If your legend position does not fit all of your legend labels, you can change the position to see if another position might be a better fit.

2) Increasing the size of the legend area

   Similarly to a Microsoft PowerPoint™ text box, you can select the legend area and resize it. Small circles appear in the four corners of the legend area and in the middle of each side. Drag the legend areas from any of these circles to increase the size of the legend area. As the size increases, Mekko Graphics will attempt to fit all labels in the new legend area at the legend font size.

   Tip: You may choose to increase the size of the legend area even if all legend items are placed. In this case, the legend items distribute themselves evenly from the top to the bottom of the legend area. This allows you to group the legend items by spreading them out in a larger space, or create a horizontal legend.

3) Reducing Legend Font size

   By reducing the legend font size, you can create more space to fit any legend labels that might be unplaced at a larger font size. To change the legend font size, open the Format Legend Task Pane, and change the font size.

4) Changing the text of a legend item

   You can always change the text in your legend item to shorten or abbreviate it in order to ensure legend text fits on your slide.

11.4 Resetting your Legend

Right click on the legend area and choose Reset Legend. You can also reset your legend by choosing Reset Legend from the Format Legend Task Pane.

Reset Legend will restore item order, legend size, legend location, legend item location, legend item font size, font family, font attributes, font text, legend area settings (border, transparency), and all hidden legend items.

12 Preference Manager

12.1 Preference Manager Overview

The Mekko Graphics Preference Manager allows you to have full customization of colors and color usage, fonts, and other settings that affect chart appearance. In addition to providing the ability to customize your global Mekko Graphics preferences, the Preference Manager also provides the ability to manage multiple Mekko Graphics themes. The ability to use multiple Mekko Graphics themes provides greater flexibility when you are creating charts for different client or user populations.

ACCESSING THE PREFERENCE MANAGER

To access the Preference Manager, go to the Mekko Graphics tab in PowerPoint and select Preference Manager.

There are two main tabs in the Preference Manager: Themes and Settings.

APPLYING PREFERENCE MANAGER SETTINGS

Once you use the Preference Manager, those changes will affect future charts that you create or edit. It will not automatically change charts you have already created.   For existing charts, you can apply your new Preference Manager settings by opening the chart and choosing Apply PM Settings from the Edit Chart toolbar.

This function allows you to take the active Preference Manager settings and apply them to your chart. This will change the default chart colors if those colors, fonts, and other features, if they are different from your Preference Manager settings.

You can update your entire deck all at once with new Preference Manager settings by clicking Update All Charts.

12.2 Mekko Graphics Themes

Mekko Graphics themes may be defined as color palette (and its defined use with different elements in Mekko Graphics charts), font, and border style. Mekko Graphics allows you to define multiple themes and provide tools for managing them. Having multiple themes provides you with more flexibility and choice.

MANAGING THEMES

Mekko Graphics Preference Manager displays a list of themes that are preinstalled with Mekko Graphics. These themes are under the Standard (Read Only) section. You may edit themes, create new (custom) themes, delete custom themes, set a default theme, and choose which themes to display in the Mekko Graphics user interface.

ADDING/EDITING THEMES

CREATING A NEW THEME

- Launch the Preference Manager
- Click the New button from the Themes (Color Palettes) tab. You will be presented with a mostly blank Mekko Graphics Theme Edit page. Start creating colors and draw orders to build your theme or add colors from an existing theme. You must also name your theme and save it.
- If you use PowerPoint themes, you can define an output font, Asian text font, and a segment border color to your Mekko Graphics theme. You must apply your PowerPoint theme to those slides for those selections to apply to your charts. For example, if you named your Mekko Graphics theme Company A, you must have a corresponding PowerPoint theme called Company A for the below fields to be applied.
- Use the Settings tab to define fonts and border styles more globally.

ADDING AN EXISTING THEME

You may also load an existing themes to your list of themes. Click the Add from File button and navigate to the desired theme's location to add an existing theme to your list.

DELETING THEMES

You can delete any custom theme from your list. You cannot delete Mekko Graphics standard (read only) themes, although you can hide them from view from Mekko Graphics. To delete a custom theme, select the theme and click the Delete button. Note, you cannot delete a theme if that theme is set as a default theme. You should be sure before you delete a theme, as the action cannot be undone.

SAVING THEMES

If you wish to share your theme with other users in your organization, you can save a theme and send it to a new user. Your colleague can then load your theme into their Preference Manager using the Add from File button. To share your theme, select the theme and click the Save to File button. You will be prompted to select a location to save it to.

CHOOSING THEMES TO DISPLAY

You can choose which themes to display in Mekko Graphics. Choose which themes will be visible by checking the checkbox in the Show in UI column in the Preference Manager Theme tab

Those themes checked will be the themes available to you in the Color dropdown box in the Edit Chart Toolbar.

Notice that the theme you designate as a default theme will be portrayed as your Multicolor theme in Mekko Graphics.

SETTING A DEFAULT THEME

You must define which theme is your default theme in Mekko Graphics. To do this, select theme you wish to be the default, and select the Set as Default button in the Preference Manager Theme tab. The default theme will have a dot in the Default column as below. You may only have one theme defined as the default. The theme you designate as a default theme will be portrayed as your Multicolor theme in Mekko Graphics.

DEFAULT FROM CURRENT THEME

Creates a theme in the Preference Manager using colors from the current Office theme. Clicking this button creates a palette based on the current Office theme, inserts it as a custom palette in the Preference Manager, and sets it as the default palette. The name will match the current Office Theme name.

USE ACTIVE COLOR OFFICE THEMES AS DEFAULT

Uses the colors and draw order associated with the current Office theme as the default palette.

12.3 Editing Themes

You may have several Mekko Graphics themes defined in your Preference Manager. Editing a theme involves specifying the available colors and their uses for various elements in your chart, the series draw order for those colors, the font typeface, and the segment border style for a specified theme.

EDITING A THEME

1. Launch the Preference Manager and double-click the theme you wish you wish to edit from your list of available themes. You may also select the theme and click the Edit button.

2. This will launch the **Mekko Graphics Theme Edit** dialog box.

DEFINING A FONT

If you use PowerPoint themes, you can define an output font and an Asian text font to your Mekko Graphics theme. You must apply your PowerPoint theme to those slides for those selections to apply to your charts. For example, if you named your Mekko Graphics theme Company A, you must have a corresponding PowerPoint theme called Company A for the below options to be applied.

DEFINING COLOR PALETTE

You have the option to create new colors, delete colors, edit the names and/or RGB values of existing colors, or add colors from a different file. You can do this for Multicolor, No Shading styles of charts, as well as Gantt Charts.

TO CREATE A NEW COLOR

1. Click the New button to create a new color. This will bring you into the Create/Edit Colors screen.

2. Here, you may name your color, and define the RGB values. To choose from either the standard or custom color palette wheel, click the appropriate tab, choose your color, .

3. Next, choose the intensity. Specify the color as dark or light. If the color is dark, the labels for that color will display as white. If you designate the color as light, the labels will display as dark.

4. Finally, you may categorize your new color as a Generic color, a Highlight color or as a Gray Scale color. This will determine where the color appears on the color palette in Mekko Graphics.

EDITING AN EXISTING COLOR

1. To edit an existing color, select the color you wish to edit, and then click the Edit button. This will bring you into the Create/Edit Colors screen below.

2. Here, you may re-name your color, and define the RGB values. To choose from either the standard or custom color palette wheel, click the appropriate tab, choose your color, .

3. Next, choose the intensity. Specify the color as dark or light. If the color is dark, the labels for that color will display as white. If you designate the color as light, the labels will display as dark.

4. Finally, you may categorize your new color as a Generic color, a Highlight color or as a Gray scale color. This will determine where the color appears on the color palette in Mekko Graphics.

DELETING A COLOR

Simply select a color from the Color Palette and click Delete to delete it from the color palette. Click Delete All to delete all the colors at once. If the color also exists in the Draw Order, it will automatically be deleted from there as well. If the color is unable to be deleted, it may be one of the Protected Colors.

ARROWS

The set of Vertical arrow buttons on the left side of the screen navigates the order the colors appear in the UI (i.e. the color palette). Clicking on one and then clicking the up or down arrow will navigate that color up and down the list. You may also use multi-select Shift-Click or Ctrl-Click to select more than one color at a time.

ADD COLORS FROM FILE

To add colors from an existing theme file (i.e. a shared theme file from a colleague), click the Add Colors from File button in the Preference Manager Themes tab.

You may choose either a PowerPoint theme, or an existing Mekko Graphics theme file. Doing so will load the theme's colors and append them to your existing theme.

DEFINING YOUR DRAW ORDER

Once you have chosen your desired palette, you may choose to include those colors or exclude them from your draw order and then define the draw order itself.

The right arrow moves colors selected from the palette to the draw order. The left arrow will remove colors from the draw order.

The set of Vertical arrow buttons on the right side of the screen navigates the draw order of the colors selected. Clicking on one and then clicking the up or down arrow will navigate the draw order color up or down the list. You may also use multi-select Shift-Click or Ctrl-Click to select more than one color at a time.

The sample bar on the right of the screen will dynamically display the color draw order choices in the order presented in the stacked bar.

NO SHADING (One color)

You can designate a No Shading color for both your bar, line, bubble and scatter charts. The choices in the dropdown menus are populated with all your palette colors.

MULTICOLOR

You can designate a colors for axes and lines, border lines, net lines, other lines (i.e. growth lines, bar comparison lines, vertical lines, segment comparison lines), chart border lines, and the background color for your bubble and scatter charts. The choices in the dropdown menus are populated with all your palette colors.

GANTT COLORS

You can designate colors for different elements of your Gantt chart. To edit your colors for Gantt charts, double click to open the desired theme, and go to the **Gantt** tab in the **Edit Theme** menu. The choices in the dropdown menus are populated with all your palette colors. Choose your colors for each gantt element.

PROTECTED COLORS

Certain colors are protected in the Preference Manager. These colors are not able to be modified or deleted, but may be removed from the draw order. Protected colors include Black, White and the grayscales: 12% gray, 25% gray, 36% gray, 69% gray.

Once you have made all the edits to your theme, you must name the theme and save it. Click Cancel to cancel all your theme edits.

12.4 Settings

The Settings tab in the Preference Manager allows you set defaults for chart and pattern style, segment borders, margins, font size and various regional settings. The options on the Settings tab are not related to specific themes but are global Mekko Graphics defaults. Please see Gantt Settings for specific settings related to gantt charts.

General Preference Manager Settings

Preference Manager Line Styles

12.4.1 General

CHART STYLE
You can now define your default chart style as either No Shading or Multicolor. By selecting this as the default chart style, all new charts created with Mekko Graphics will have that chart style set as the default.

PATTERN STYLE
You can define your pattern style for your charts as either No Patterns or Patterns.

No Patterns - No patterns will ever automatically draw for series or segments. Solid colors will appear according to the draw order and will repeat from the beginning if there are more series than colors in your draw order.

Patterns - Patterns of colors will appear if there are more series than colors in your draw order.

COLORING MODE
You can control whether your colors appear according to your defined multicolor palette before you sort your series, or apply your multicolor palette after you sort your series. You can sort

By Series Before Sort - the multicolor draw order is applied before the sort is applied.

By Series After Sort - the multicolor draw order is applied after the sort is applied.

By Bars - the multicolor draw order is applied by bar, so every segment in a bar is the same color.

By Segments - each segment inherits a unique color according the multicolor draw order.

DRAW SEGMENT BORDERS

You can designate whether Mekko Graphics draws segment borders on charts by default.

Y AXIS

Title Position:
You may choose the orientation of your Y axis title label: horizontal, vertical or top tick aligned (meaning left aligned to the top tick mark on the Y axis).

Units/Currency:
You have the option to choose whether your scale values will appear for all labels on the Y axis or simply for the top label on your Y axis.

NEW CHART DEFAULTS

Use Blank Series/Bars Names:
If Use Blank Series/Bars Names is unchecked, a series/bar will not appear on the chart if the series/bar label is blank. If the Use Blank Series/Bars Names is checked, the series/bar will appear on the chart whether the series/bar name is blank or not.

Place All Labels:
You have the option to display all the labels in your chart (no labels will be unplaced). Labels that would typically not fit in your chart will

smartplace at the smartplace font size you have defined in the Preference Manager.

NUMBER FORMAT

Auto (System Settings):
Checking this checkbox will inherit the computer's regional settings for number format.

Negative Number Format:
You have 5 options to choose for the display of negative numbers in your chart. These are Dash Before, Parentheses, Dash After, Dash Before with Space, and Dash After with Space. Indicate your choice by selecting your desired option from the drop down menu.

Decimal Separator:
Choose the symbol you would like to designate as a decimal separator.

Thousand Separator:
Choose the symbol you would like to designate as a thousand separator.

LINE WIDTH

Axes:
Customize the line width of the X and Y axis for all newly created charts.

Chart Border:
Customize the line width of chart borders for those charts with borders (e.g. bar mekko)

Segment Border:
Customize the line width of segment borders for all newly created charts.

FONT

Choose a default font typeface for Latin and Asian text. Choosing the Auto checkbox will inherit your default PPT theme font. Click the Enable checkbox to enable Asian font and click Rotate Japanese characters if you wish to allow rotated Japanese character orientation.

FONT SIZE

The font section allows the user to set the maximum, minimum, and minimum SmartPlace font sizes for all labels on your charts.

> The maximum font size is the maximum size any label can automatically place on your chart. The minimum font size is the minimum size any label will place on your chart, and the Minimum SmartPlace font size is the minimum size a smartplaced label will place on your chart.
>
> For example, if you want more labels to place out of the box on your chart, you may wish to lower the minimum font size. If you don't want large labels on your chart, reduce the maximum font size. Feel free to play with these values to see what works best for the types of charts you wish to create.
>
> If you wish to restore the default settings for font size, click Rest ore Font Sizes.

You can choose the region from the pre-loaded drop-down list and Mekko Graphics will automatically reset your Preference Manager settings for that region. You may also overwrite those settings by choosing the Customized radio button and creating a custom definition for your region. Customized settings in this tab are saved for each region.

CHART MARGINS

Now you have much greater control over the margins in your chart, and you can now set those default margins using the Preference Manager. Need extra room for multiple data rows, or a narrower left margin? Or a horizontal legend? Create the look that best fits your needs. You have to option to adjust your default margin settings for all of your various chart elements.

CHART LAYOUT

Normal - sets the chart layout to accommodate normal margins, accommodating ample space for the use of legends, data columns and data rows.

Narrow - sets the chart layout to accommodate narrow margins, allowing more space for bars and series.

Restore All Defaults:
restores all the Mekko Graphics settings to their default values.

Load from File:
loads Preference Manager settings from any Mekko Graphics structured XML file, from any location you wish. Use this if you wish to load Mekko Graphics preferences by other users.

Save to File:
saves your preferences to a Mekko Graphics XML file and allows you select both the folder and filename for the file. You can save an unlimited number of Mekko Graphics XML files.

12.4.2 Line Styles

You can set the default line styles (width and style) for all the different line elements in your chart. There are six broad groupings of lines, and all lines are included in these six groupings: Axes, Series Lines, Borders, Adornment lines, Bubble/Scatter lines, and Miscellaneous Lines. New charts will inherit these settings for all line styles. Clicking **Apply PM Settings** from the Edit Chart toolbar will update your chart to these default settings.

12.5 Gantt Settings

The **Gantt** tab in the Preference Manager allows you set defaults for all of the Gantt elements in your chart, as well as global Gantt chart default settings. The options on the Gantt tab are not related to specific themes but are global Mekko Graphics Gantt chart defaults.

GENERAL TAB

Chart
Define your default font size for gantt labels, thickness of border lines and default timeline element (process, bar, line or bracket)

Layout
Set defaults for which resource columns will be displayed in your gantt chart and whether those columns will display on the right- or left- hand side of your chart.

Bullets
Define the style of your bullets and set indentation defaults.

Date Format
Set your default date format for all dates in your gantt chart. Auto setting will inherit the date format defined in your regional settings.

First Day of the Week
Set the first day of the week as Sunday or Monday.

Weekend Days
Define what days are considered weekends.

Q1 Start Month
Define what month begins the first quarter of your fiscal year

ELEMENTS TAB

You may define defaults for border style, border thickness, and start and end tip displays for processes and bars. For bars, you may also set the default height of the bar. You may do this for for both Default and Alternative Styles.

For brackets and lines, you can set the default marker style, marker size, line thickness, and line styles for both Default and Alternative Styles.

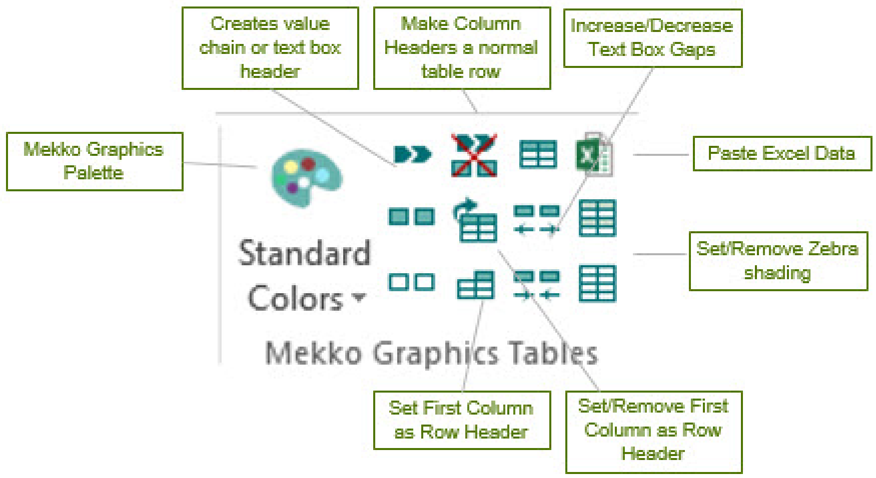
For milestones, you can set the default marker style, size, and outline style for both Default and Alternative Styles.

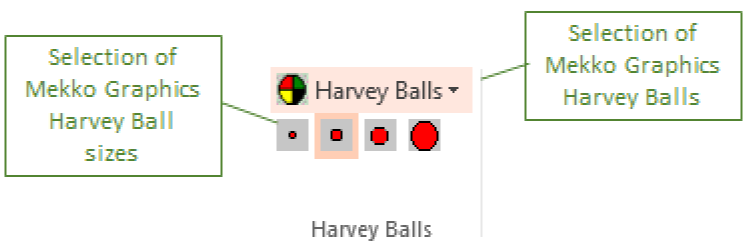
For datelines, set your default line style and thickness, as well as marker style and size for both Default and Alternative Styles.

For date shading, set your default border width and style as well as the transparency level of the shade itself, and whether the shade appear in the front or the back of other elements in your gantt chart. You may do this for for both Default and Alternative Styles.

13 Text Tables

13.1 Text Tables





13.2 Formatting a Text Table

There are two separate table sections in PowerPoint designed to help you format your Mekko Graphics tables: the Mekko Table section and the Harvey Balls section.

MEKKO TABLE SECTION

Place your cursor in any cell in the table and use the Mekko Table functions to customize headers, bullets and paste data from Excel.

Mekko Standard Colors button will color the selected cell(s) with your Mekko Graphics palette colors. This palette will adapt according to your Preference Manager color palette choices.

The next group of three buttons allows the user to set the first row of the selected data table as either a value chain, text box, or simply as a normal table row.

Resize Column Headers to Match Table Columns is used to update the existing header row after the user has resized or otherwise edited the table. By selecting this button, Mekko Graphics will resize column headers to match table columns.

Value Chain and **Text Box** buttons enable you to create a value chain or text buttons with or without using the first column.

Set First Column as Row Header will set the first column as the row header. Remove First Column as Row Header will remove the first column as the row header.

Text Box Gaps buttons increase/decrease the gaps between text boxes. This only works for data tables that have the first row displayed as text boxes.

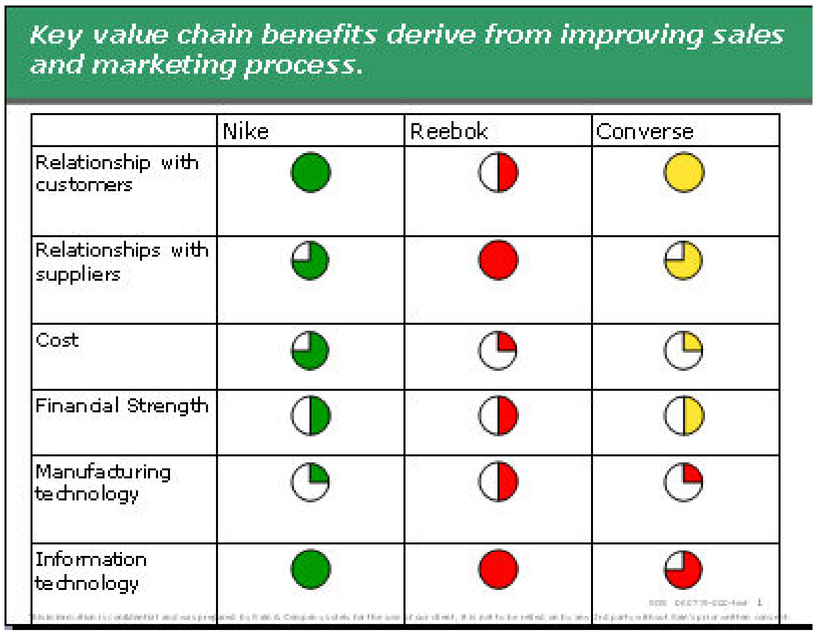
Paste Excel Data allows you to paste your Excel data into your table. Mekko Graphics will paste your data so that the contents of each cell paste in a unique text table cell. It will also retain all of your text formatting.

Alternate Row Shading and **Clear Row Shading** inserts/deletes zebra shading pattern in your table.

HARVEY BALLS

The Harvey Balls section allows you to insert the appropriate symbol in a cell or cells of an existing PowerPoint table as a custom bullet. When a symbol is inserted into a cell, the bullet is inserted, and one space is entered so that the bullet will be displayed. With your cursor resting in the cell, click the drop down arrow to insert the desired Harvey Ball.

The first four buttons control the relative size of symbols that are to be added. If you click on one of these buttons and then click on a symbol, the symbol will be inserted at the size selected. The size of a symbol can also be adjusted by setting the size of the font in the cell.



13.3 Inserting a Text Table

Mekko Graphics uses native PowerPoint to create text and data tables. Mekko Graphics tables are designed to use standard PowerPoint tables. This allows the user to modify data tables using a standard, well-known interface.

INSERTING A TEXT TABLE

1. Go to the PowerPoint Insert Menu and choose Table. Click the icon to insert the size table you wish to create. Enter your data into your text table.

	Inbound Logistics	Manufacturing	Outbound Logistics	Marketing and Sales	Service
Short Term	•Work with suppliers - reduce costs - increase efficiency	•Implement JIT •Rationalize manufacturing facilities •Improve quality	•Evaluate all delivery and warehousing expenses	•Reorganize sales force •Implement national accounts	•Measure customer satisfaction •Implement retention program
Long Term	•Implement supplier quality program	•Identify new lower cost out-sourced factories	•Partner with key delivery companies	•Implement web-based sales - determine role of web services •Improve brand identify	•Evaluate key service costs - restructure service delivery process

2. In the Design tab in the Table Tools section of PowerPoint, customize your table with Mekko Graphics Table Functions. Add Mekko Graphics Harvey Balls if desired.

13.4 Export Excel Table to PowerPoint

Mekko Graphics allows you to export an Excel table to PowerPoint, creating a link between the PowerPoint table and the Excel table. You can update the link in the same manner as charts.

Export Excel Table to PowerPoint

1. Select your Excel range in the Excel table

2. With the range selected, click **Export Table** from the Mekko Graphics ribbon

3. Once you are navigated to PowerPoint, click the left mouse button to insert the selected range into PowerPoint

13.5 Link to Excel Table

Once you have linked to an Excel table, you can manually refresh the link if the data in Excel changes.

REFRESH LINK TO EXCEL:

Mekko Graphics allows you to manually refresh an established link to Excel. When you refresh your link, the data in Microsoft Excel™ will re-populate the referenced data table. Therefore, any changes to the data in your Excel range will be reflected in table in PowerPoint. The Refresh option is only enabled if there is an established link. If there is no link, the **Refresh** button is disabled.

The refresh can be for one table or can be initiated for all tables in your slide deck through the Excel Link Manager.

TO REFRESH A TABLE IN POWERPOINT:

From the Excel Link Manager, click the Refresh icon in the row representing the table you wish to update. You can also right click the table and click **Refresh**.

Note: Auto Refresh functionality is not available for tables, as it is with charts.

TO REFRESH ALL LINKED TABLES:

To refresh all linked tables in a presentation, open the Excel Link Manager and choose **Refresh All Table Links**.

TO REMOVE A LINK TO EXCEL:

You may remove any established table links to Microsoft Excel™ from Mekko Graphics. The Remove option is only enabled if there is already an established link. It is not enabled if there is no link. Removing a link simply removes the reference to Excel; it does not remove the data.

HOW TO OPEN A LINKED FILE:

Mekko Graphics allows you to open the linked table in Microsoft Excel™. From the Edit Chart toolbar, choose Link to Excel --> Open Linked File.

14 Gantt charts

14.1 Overview

The Gantt chart is a project management tool that displays a graphical representation of the stages or activities in a project work plan over time. Each task displays as either timeline (a horizontal bar whose length is proportional to its time for completion) or as a milestone (a single event marking an event's completion).

A Gantt chart is logically broken down into three areas. At the top of the gantt chart is the header. The Gantt header provides the scale upon which the chart is created. On the left side of the chart is a column where the timeline and milestone text descriptions (tasks) are written. On the right side of the chart is the graphical task display corresponding to each timeline element and/or milestone. A fourth, optional component may be displayed between the task description and the graphical display which corresponds to the resource column(s) in the spreadsheet.

Gantt charts display a project's task and timeline information using calendar dates. The software then calculates the task duration based on the calendar difference between the two dates and the length of the work week. Gantt charts use a calendar and the duration of activities is represented by bars or processes, arrows, and brackets. Singular events are represented by milestones.

14.2 Inserting a Gantt Chart

Insert a chart as you would any other chart in Mekko Graphics. Select **Gantt** from the Gantt drop down menu in the Mekko Graphics toolbar. There are three Gantt layouts from which to choose:

- Gantt (Tasks as Lists)
- Gantt (Tasks as Boxes)
- Gantt (Blank)

Choose your desired layout from the Gantt dropdown menu in the Mekko Graphics toolbar. In any Gantt chart, the scale is based on dates. To change the visible date range, click the Calendar icon in the Edit Chart Toolbar and choose your Start and End dates. The calendar scale is initially automatic, but can be a manual scale if needed.

CALENDAR

After you have inserted your Gantt chart, you will want to choose your date range. Select the Calendar icon in the Edit Chart Toolbar and choose your Start and End dates. Select the desired start date with a single click, and select the desired end date with another click while holding down the Shift key. You may also just hold down the mouse button and drag the mouse along to determine a range. You can also simply type in the desired dates.When you are done, click OK. The selected date range will then be applied to the chart.

You can also click and drag the handles on the header to adjust your date range. Click and drag the handle at the beginning or end of the range that appears on the selected scale. Using this method, you can quickly expand the chart to cover a larger date range by dragging the handles of a scale with larger units (e.g., years or quarters).

DATE FORMAT

By default, Mekko Graphics displays dates in the “short date” format that is defined in the regional settings of the system. For the English U.S. local, the short date format is “MM/DD/YY”. You can change the date format by choosing your desired format in the Timeline section of the selected scale in the Edit Chart toolbar. You can also choose which timeframe periods to include (Years, Quarters, Months, Weeks, Days) by selecting up to three levels in the toolbar.

Therefore, if a presentation is created in one office and either the chart or slide is sent to another office, the date format will change according to the Regional Settings of the target computer/office (unless the locale was custom-set during the chart creation). You still have the capability to change the date format at any time by selecting the range and editing the date format and/or locale. This gives you maximum flexibility in customizing the look of your chart.

14.3 Adding Tasks

A Gantt chart row is defined as a single task, regardless of its level. The graphical display of a task consists of one or more timelines or milestones.

TASKS

To add a task you can select Insert Task from the Edit Chart toolbar. You can also simply press Cntl Enter on your keyboard. Double click the task to edit the text. To add a new task immediately after an existing task, you can simply press ENTER.

To demote a task (move it to the right to make it a subtask), press the tab key. To promote a task (move it to the left), press Shift Tab. Use Ctrl Up or Ctrl Down to move tasks up or down. You can also insert tasks before or after your selected task by right clicking on the selected task and choosing the appropriate option or using a keyboard shortcut. Click Mekko Graphics Shortcuts for a full list of shortcut options.

To delete a task, select the task area, right click and choose **Delete**. Remember, a task is comprised of all of its subtasks, so if you delete a task, you will also delete any subtasks associated with it.

You have the option to hide the entire task section in your Gantt chart by deselecting the Show Column checkbox.

You have the ability to copy and paste tasks from your gantt chart to other documents. To do this, right click in the task area and choose **Copy Task List**. You can then paste into Excel or any other application. You can also copy a list from another application and paste it into your Gantt chart task list.

ROWS

The rows, in turn, contain timeline items such as processes, bars, lines, brackets and milestones.

You can select a row and drag it to another location by holding down and dragging your mouse to the desired location.

Each row can be formatted with a horizontal separator line and/or row shading. To add shading to a row, right click on the row, and from the floating toolbar, choose a color from the background color dropdown menu. If you wish the color to also include subtasks, choose the **Task Background Fills Subtasks** button. If you wish the color to include the entire row, including timeline elements, choose the button **Task**

Background Includes Whole Row. To show horizontal separators, choose the button **Show Separator** from the floating toolbar.

14.4 Adding Timeline Elements

There are several types project timelines that are used to visualize periods of time and events.

- A **Bar** show the duration of some activity.
- A **Process** is generally larger than a bar and can contain text. A process can span multiple tasks.
- **Milestones** mark events with no duration.
- **Brackets** and **Lines** are used to label periods of time which typically comprise more than one bar.
- **Shades** can used to visualize non-working times such as weekends, vacations, or holidays.
- **Datelines** are vertical lines that are often used to mark the current date or an important date in your chart.

ADDING TIMELINES

To add a timeline to your chart, click your mouse in the desired location and choose the element you wish to add from the Edit Chart Toolbar, or right click and select the desired timeline type. To adjust the length of the timeline, you can select either end and drag. To move the timeline, simply select the timeline object and move it with your mouse. You may also use the Calendar on the timeline's context menu to specify exact start and end dates for your timeline. You may customize the color, width, and pattern of your timeline. You also may add markers (customizing color and size) to the ends of the timeline. Right click on the timeline to have access to all the different formatting options.

Timelines are manual by default, but can be set to automatically calculate the length based on its subtasks.

For example, let's say Task 1 has two subtasks:

Subtask 1 has a timeline with the range 9/2/2020 to 10/2/2020.

Subtask 2 has a timeline with the range 10/1/2020 to 11/5/2020.

You can set Task 1 to be calculated which would set the timeline for the start and end date to be automatically calculated based on the subtasks. In this case, it would be 9/2/2020 to 11/5/2020.

In this case, if you move or resize your subtasks, its parent task will automatically adjust. To set your timeline to be automatically calculated based on its subtasks, right click the timeline and click **Calculated Range** from the floating menu.

Upon inserting a timeline, the color, pattern and size is automatically calculated based on the color palette and other settings specified in your Preference Manager. You may manually change it to suit your needs. You have full control over the line thickness and color of each timeline element on a chart level or for all gantt charts via the Preference Manager.

TIMELINE LABELS

An item label contains the item's date or date span. This information is maintained in a text field and is updated whenever the item is moved. Right click the timeline object and choose the desired field from the Show Date(s) Text function in the floating menu. You can add text to the label or replace the default content with custom text.

For example, if you have a process, you can display the start date and end date or duration by choosing your desired option from the drop down menu. If you want to add custom text, you can just double click the label and add your own text or choose **Edit Text** from the floating menu.

Make Label Background options are

- Transparent,

- Opaque (label's background color is the color of the underlying area in the middle of the label),

• Colored (label’s background is the color of the parent)

MILESTONE DISPLAY

The graphical display of a milestone consists of a marker. You may select color, size, as well as the type of marker. The color, size, and marker type may be automatically calculated based what you have defined in your Preference Manager, or you may customize it for that chart.

The milestone marker will be placed on the date entered and will assume a placement of 12 noon on that date. Therefore if the secondary header is daily, the milestone will appear in the middle of the two tic marks defining that day. To move the milestone, simply select it and move it with your mouse. You may also use the Calendar on the milestone's context menu to specify exact date for your milestone.

You have the option to show the milestone outline and designate the style of that milestone outline.

Milestones can automatically be set to today's date by right-clicking the milestone and choosing **Auto Adjust to Today**. This makes the milestone dynamic. When the milestone is set to be dynamic, it will always adjust to today's date each time the chart is opened in Mekko Graphics.

MILESTONE LABELS

By default, milestone date labels placed below the milestone marker and horizontally center-aligned with the milestone marker. You may automatically place the label in one of four pre-defined locations related to the milestone marker: Right, Left, Bottom, Top. When a new milestone is inserted, the label will inherit both the position and orientation of the last used milestone. For example, if the last milestone was placed above the milestone marker, the next inserted milestone will have the associated label placed above the marker also.

An item label contains the item's date or date span. This information is maintained in a text field and is updated whenever the item is moved. Right click the milestone object and choose the desired field from the Show Date(s) Text function in the floating menu. You can add text to the label or replace the default content with custom text. You can control the background color of the timeline label to be opaque, colored, or transparent by right clicking the label and choosing background color.

Make Label Background options are

- Transparent,
- Opaque (label's background color is the color of the underlying area in the middle of the label),
- Colored (label's background is the color of the parent)

STYLES

There are two options for default styles of all timeline elements on your gantt chart: default style and alternative style. You may set up each style in the Preference Manager. Once you define your two style for your timeline elements, you can toggle back and forth between the two styles for timeline elements in your chart. To do this, right click on the timeline, and in the floater menu, choose the **Toggle between two default styles** button or click F12 to quickly toggle back and forth.

14.5 Resource Columns

For Gantt charts, resources are defined as something which is required to complete a task. Resources are characterized by the fact that they have a limited time availability (e.g. an employee that works 8 hours a day, 5 days a week).

APPLIES TO: GANTT CHART

You have the option to display up to two resource columns on the Gantt chart. You may place them either on the right or left hand side of your chart.

ADDING RESOURCE COLUMNS

To add a resource column, choose which columns from the Edit Chart toolbar. You can choose **Show Column 1**, **Show Column 2**, or both. The default titles for these columns are Responsible and Comment. You may change these column labels by double clicking them and changing the label. Specify right or left by clicking the appropriate button.

ADDING TEXT TO RESOURCE COLUMNS

To add text to a resource column, just double click in the row where you wish to add text and type your text. You have the ability to change the alignment for resource column labels (i.e. left-, center-, or right-aligned). To change the alignment, simply right click to see see all of your alignment and formatting options. Other options include text justification, font and color attributes, and text orientation.

You can change the which resource columns will display automatically, as well as the default locations of your Resource Columns in the Preference Manager.

14.6 Gridlines, Shading, and Datelines

APPLIES TO: GANTT CHART

In addition to formatting the entire Gantt chart, you can optimize the look of your chart by special formatting options designed to draw attention to specific tasks.

GRIDLINES

Gridlines are the horizontal lines on a chart that delineate boundaries. You can display horizontal gridlines for the task and resources section of your chart, as well as the timeline sections of your gantt chart. For the task section, you can display gridlines for any or all of the three levels of tasks.

To add gridlines in your Gantt chart, you can right click in the column header, and in the **Tasks Area Options** dropdown menu, check the box for the gridlines you wish to appear. You can also do this in the **View** tab of **Format Task Pane**. You can customize the look of the gridlines in the **Style** tab of the **Format Task Pane. Separators** are similar to gridlines but will add a line to a specific row. To add a separator line, right click the task and click the **Show Separator** box in the floating menu.

SHADING

There are three mutually exclusive options for shading:

1. Automatic Horizontal Shading - Automatic shading of alternate (zebra) tasks based on any level in your task list. Task zebra shading is horizontal, based on task level. To turn on automatic shading, go to the **Format task pane**, **View** tab, and in the Gridlines and Shading section, check the appropriate task level(s) you wish to shade. To change the color of the shade, go to the **Style** tab, Tasks section and change the default color of the shade. To change this color for all charts, go to the Preference Manager.

2. Automatic Vertical Shading - Automatic shading of alternate (zebra) time periods based on any level in your header (years, quarters, months, weeks, days, and weekends). Period zebra shading is vertical, based on period. To turn on automatic shading, go to the **Format task pane**, **View** tab, and in the Gridlines and Shading section, check the appropriate period(s) you wish to shade. To change the color of the shade, go to the **Style** tab, Timeline section and change the default color of the shade. To change this color for all charts, go to the Preference Manager.

3. Date and Row Shading - Adding a vertical shade manually to a specified location in your timeline area. To insert a shade, right click where you wish to insert it, and choose **Insert Shade**. You can resize the shade, add text to the shade, and move the shade. To change the color of manual shades in your Gantt chart, go to the **Style** tab of the **Format Task Pane** and edit the color for **Date Shading**. You can also choose to shade individual rows (horizontal). To shade an individual row, right click the row and select a background color dropdown in the floater menu.

DATELINES

You may add an unlimited number of datelines to your chart. To add a dateline, right click anywhere in the timeline area, and choose **Insert Dateline**. Right click on the dateline to edit the color, style, and thickness, and markers of the line. To change the default for all datelines in your chart, edit the default style in the **Style** tab of the **Format Task Pane**. To change the dateline format for all charts, go to the Preference Manager. You can control the background color of the dateline label to be opaque, colored, or transparent by right clicking the label and choosing background color.

Datelines can automatically be set to today's date by right-clicking the dateline and choosing **Auto Adjust to Today**. This makes the dateline dynamic. When the dateline is set to be dynamic, it will always adjust to today's date each time the chart is opened in Mekko Graphics.

14.7 Headers

APPLIES TO: GANTT CHART

Think of the Gantt Header as the “axis” of the Gantt chart. The Gantt header provides the scale upon which the chart is created. Considering the Gantt chart header as the “axis” of the chart, the levels of chart header are analogous to the major and minor scale of the axis.

You may choose which periods to display in your header by clicking up to three desired periods in the Timeline section of the Edit Chart Toolbar (Y, Q, M, W, D). Each button contains a dropdown so you may also choose the display format of those periods (i.e. January, Jan, J).

SHADING/HIGHLIGHTING

Right click in the header to see the all of your formatting options for shading, format, and defining your date range. You have full flexibility to color any part or all of your header.

Other options include the ability to choose between a week start day of Sunday or Monday, and the ability to define your weekend days. These are found in the **Misc** tab of the **Format Task Pane** And All of these options are also able to set as default values in the Preference Manager.

DATE RANGE

You may also choose a date range for the chart in the **Format Task Pane**. The start and end date may either be automatically calculated based on the chart data, or you can choose a start and end date manually by unchecking the Automatic Range checkbox. A calendar control is provided to allow you to enter the dates.

HIDE/SHOW WEEKEND DAYS

You have the option to hide the display of weekends in your Gantt chart as well as designate which days are defined as weekend days.

To hide weekends in your Gantt chart, click the **Hide Weekends** checkbox in the Timeline section of the Edit Chart toolbar. If you have a timeline in a section of a weekend, the following rules will apply to your timeline.

The duration of the timeline will change to number of workdays. It will not include weekends.

- If a timeline element ends on a weekend, the element will stop on previous business day before the weekend
- If a timeline element starts on a weekend, the element will start on following business day after the weekend.
- If a milestone is on a weekend, the milestone will move to the previous business day.

You can also define which two consecutive days are considered weekends. To define weekend days, go to Format Chart --> **Misc** tab and in the **Weekend Days** section, choose which two consecutive days you would like to be considered a weekend.

You can also set default weekend days in the **Gantt Charts** tab of the Preference Manager. Doing so will define the selected days as weekends in all of your gantt charts.

WEEK NUMBERING RULE

You have the option to define the first week as being either simply determined by the **first day** of the week or by the **first four day week**. For example, Jan 1, 2021 was a Friday, so the if this option was set to **First Four Day Week**, week 1 of 2021 would start on Monday, January 3rd.

SHOW COLUMNS

You have the option to hide the display of the Tasks list in your Gantt chart. Timeline elements will draw from the left hand side of the chart.

TIME HEADING FORMAT

The start and end date may either be automatically calculated based on the chart data, or you can choose a start and end date manually.

You may also choose which periods comprise your chart header. A single level may be yearly, quarterly, monthly, weekly, or daily. To do this, simply click the desired periods in the Edit Chart toolbar you wish to include.

Typically the starting month for Q1 is January, but you can customize the starting month for Q1 in the Format task pane.

1. First ensure you are displaying Quarters in your heading, by checking the Quarters checkbox in the Edit Chart toolbar.

2. Click the Format button

3. Go to the Misc tab and in the Fiscal Year section choose the **Q1 start month** from the drop down menu.

Yearly

Quarterly

Monthly

Weekly

Daily

14.8 Milestone

A milestone is a scheduling event in a project that signifies the completion of a major deliverable or a set of related deliverables. It is a flag in the work plan to signify that some other work has completed. Usually a milestone is used as a project checkpoint to validate how the project is progressing.

14.9 Timeline

The graphical element of the Gantt chart representing the duration of the task. A timeline can be a process, bar, line or bracket. A timeline of zero duration is a milestone.

14.10 Resource

Something which is required to complete a task. Resources are characterized by the fact that they have a limited time availability (e.g. an employee that works 8 hours a day, 5 days a week).

15 Mekko Graphics Ribbons

15.1 Marimekko

You can use the Quick Launch method to automatically create any desired Mekko Graphics chart.

The Quick Launch buttons are split buttons. Choosing the top half of the button will insert the default chart type listed on the button. For example, choosing the top half of the Marimekko will insert a Marimekko chart.

From the Marimekko menu, choose from the drop down menu to create either a Marimekko or a Bar Mekko chart.

15.2 Stacked Bar

You can use the Quick Launch method to automatically create any desired Mekko Graphics chart.

The Quick Launch buttons are split buttons. Choosing the top half of the button will insert the default chart type listed on the button. For example, choosing the top half of the Marimekko will insert a Marimekko chart.

From the Stacked Bar menu, choose from the drop down menu to create one of the Stacked Bar chart types: Stacked Bar, 100% Stacked Bar, Horizontal Stacked Bar, Stacked Bar with Growth Line, Stacked Cluster Bar, 100% Horizontal Stacked Bar, or Stacked Bar Line chart.

15.3 Cluster Bar

You can use the Quick Launch method to automatically create any desired Mekko Graphics chart.

The Quick Launch buttons are split buttons. Choosing the top half of the button will insert the default chart type listed on the button. For example, choosing the top half of the Marimekko will insert a Marimekko chart.

From the Cluster Bar menu, choose from the drop down menu to create one of the Cluster Bar chart types: Cluster Bar, Horizontal Cluster Bar, 2Y Cluster Bar, and Cluster Bar Line chart.

15.4 Waterfall

You can use the Quick Launch method to automatically create any desired Mekko Graphics chart.

The Quick Launch buttons are split buttons. Choosing the top half of the button will insert the default chart type listed on the button. For example, choosing the top half of the Marimekko will insert a Marimekko chart.

From the Waterfall chart drop down menu, choose from the drop down menu to create either a Build Up Waterfall, Horizontal Waterfall, Change Waterfall, or Stacked Waterfall chart. For descriptions of these chart types, you may hover over the chart type to view the tooltip.

15.5 Area

You can use the Quick Launch method to automatically create any desired Mekko Graphics chart.

The Quick Launch buttons are split buttons. Choosing the top half of the button will insert the default chart type listed on the button. For example, choosing the top half of the Marimekko will insert a Marimekko chart.

From the Area menu, choose from the drop down menu to create either an Area, 100% Area, or Pie chart.

15.6 Line

You can use the Quick Launch method to automatically create any desired Mekko Graphics chart.

The Quick Launch buttons are split buttons. Choosing the top half of the button will insert the default chart type listed on the button. For example, choosing the top half of the Marimekko will insert a Marimekko chart.

From the Line menu, choose from the drop down menu to create any of the Line charts: Line Chart, 2Y Line Chart, or Line chart with CAGR.

15.7 Bubble

You can use the Quick Launch method to automatically create any desired Mekko Graphics chart.

The Quick Launch buttons are split buttons. Choosing the top half of the button will insert the default chart type listed on the button. For example, choosing the top half of the Marimekko will insert a Marimekko chart.

From the Bubble menu, choose from the drop down menu to create any of the Bubble and Scatter chart types.

15.8 Gantt

You can use the Quick Launch method to automatically create any desired Mekko Graphics chart.

The Quick Launch buttons are split buttons. Choosing the top half of the button will insert the default chart type listed on the button. For example, choosing the top half of the Marimekko will insert a Marimekko chart.

To insert a gantt chart, choose Gantt from the Mekko Graphics menu.

15.9 Email Selected Slides

Email Selected Slides allows you to select specific and even non-contiguous slides and email that subset of slides in your presentation.

To email a range of slides in your deck, select the slides (use Ctrl-Click for discontiguous slides) you wish to include in the email.

Name the file that you are planning on emailing. If you wish to include the timestamp in the filename, check the Add Timestamp checkbox. To save a copy of the presentation in the same folder, select the Save a copy in the same folder checkbox.

CONVERT MEKKO GRAPHICS CHARTS TO .PNG IMAGES

We recommend that you check the Convert Mekko Graphics charts to PNG images checkbox if you need the charts to be viewable on an I-phone or mobile device. Checking this checkbox will ensure that the images are viewable, but they will not be editable Mekko Graphics charts.

When you click Send those slides, your email program will launch and include the deck with the selected slides as an attachment.

15.10 Export Charts to Excel

The Export to Excel features allows you to export all your chart data for every Mekko Graphics chart to an Excel spreadsheet.

Choose this button from the ribbon on the Mekko Graphics tab in PowerPoint. All of your charts will export to an Excel spreadsheet. The spreadsheet will automatically reside in the same folder as your presentation and will be named with the same name. Each sheet in the workbook corresponds to each chart in your deck and will be named with the slide number and chart number (i.e. Slide3 Chart1).

When completed, you will receive a message saying the export was successful.

15.11 Insert Multiple Charts

To insert multiple charts per slide, select Insert Multiple Charts dropdown and choose from the available layout options.

This action will result in pre-populated charts according to the selected layout option.

Click here for more information on the Quick Launch Method.

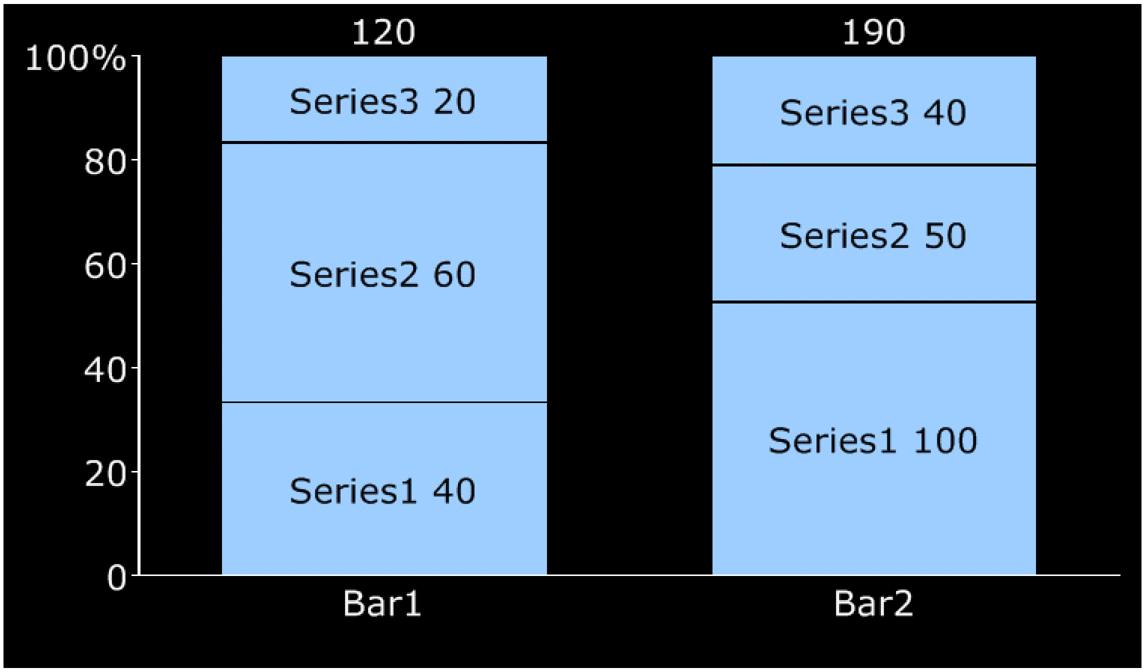
15.12 Dark Background

APPLIES TO: ALL CHARTS

You now have the ability to set a Mekko Graphics chart to be optimized for a presentation with a dark background. This means that the chart will adjust its axis and line colors to white in order to accommodate for presentations with a dark background.

To do this choose the Dark Background button from the Mekko Graphics tab in PowerPoint. Choosing this button will cause it to highlight, indicating that any new chart in the presentation will have dark background optimization.

Once selected, if you edit an existing chart, the axis and line colors will change to a white color for better display on a slide with a dark background.



If you wish all existing charts in your presentation to be optimized for dark backgrounds, select this button and then you can simply choose the button Update All Charts, which will automatically update all charts in your deck to the dark background setting.

If you wish to remove this setting for your presentation, simply select it again and it will turn off. The highlight on the button will be removed. If you now edit an existing chart, the axis, border, and line colors will be reset to dark to better display on a slide with a white background.

15.13 Preference Manager

The Mekko Graphics Preference Manager allows you to have full customization of colors and color usage, fonts, and other settings that affect chart appearance. In addition to providing the ability to customize your global Mekko Graphics preferences, the Preference Manager also provides the ability to manage multiple Mekko Graphics themes. The ability to use multiple Mekko Graphics themes provides greater flexibility when you are creating charts for different client or user populations.

Click the icon from the Mekko Graphics tab in PowerPoint to launch the Preference Manager.

15.14 Set the Same Y Axis Scale

When there are multiple charts on the same slide, you may desire all the charts share the same scale in order to make comparisons between or among the charts. To do so, simply select the charts you wish to have the same scale, and click the **Set Same Y Axis Scale** button in the Edit Chart Toolbar. The first selected chart is designated as the master, which is then applied to all subsequent selected charts. All of the selected charts will accommodate to the scale of the first chart selected.

15.15 Update all Charts

APPLIES TO: ALL CHARTS

You have the ability to update all charts in a presentation at once, without having to open each chart individually.

You would select this option if you had made changes in your Preference Manager and wished to update all charts in your presentation to new preference choices, or if you had set a number of charts in your presentation to be optimized for dark slide backgrounds.

To do this, choose the Update All Charts button from the Mekko Graphics menu in PowerPoint. Choosing this button will proceed to go through each chart in your presentation and update it without you having to open each chart individually.

If you wish to update just one chart, you can right click on the chart in PowerPoint and choose Update Chart

Note: Update All Charts does not refresh the link to excel for slides which have links.

15.16 Import from MS Graph

Mekko Graphics contains the ability to import Mekko Graphics-supported chart types from Microsoft Graph and create a comparable Mekko Graphics chart. Mekko Graphics imports all data, axis information, and series definition (i.e. that data is defined as a line, a bar, a bubble, etc.). Mekko Graphics can import a limited amount of information from these charts. We will typically be able to extract the data from these charts and some of the label information. Information that is added directly to PowerPoint and not stored in the Microsoft Graph object will not be imported.

To import a Microsoft Graph object, navigate to the chart in PowerPoint, and then choose:

All Charts in Current Slide to insert the chart(s) on the current slide

or

All Charts in Current Presentation to import all the charts in your presentation

15.17 Chart Gallery - View button

Overview of Chart Gallery

The Chart Gallery is a repository of charts you can maintain and have at your disposal. Mekko Graphics comes with a number of sample charts, and you may add any charts and arrange in any way you choose. They are categorized according to internal tags so that you can easily find the charts that are most interesting to you! For example you can easily find all the marimekko charts. You can even search for specific text in your charts, like "iphone"or search for charts with specific features, like growth lines. You can add charts or slides to the gallery from your own presentation. Use the Chart Gallery as a reference library of charts for your organization, categorize them by client or division or in any structure that is most useful. To open the Chart Gallery, click the **View** button in the Mekko Graphics Chart Ribbon.

Tagging Charts and Searching the Gallery

How to Tag a Chart:

You can tag charts with keywords that help you find them later. Open the chart you want to tag. From the Chart menu, choose “Chart Properties”. In the Chart Properties dialog box, type your desired tags in the Tags field. To add multiple tags, separate the tags with commas.

Searching the Gallery

To search within your chart gallery, go to the search bar and enter your search parameters. You can search by tags (i.e. client name), type of chart (i.e. marimekko), features of the chart (i.e. growth line), or content (words within the chart titles and labels). After you enter your search parameters, a list of charts that meet your search criteria will be displayed.

Adding Gallery Items to your Presentation

To add charts or slides from the Chart Gallery to your presentation, click the **View** button in the Mekko Graphics Charts Ribbon. This will open the Gallery on the right hand side of the screen. You can search for the chart or slide you wish to add by searching for internal tags, features of the chart, like "growth lines" for example, or searching by chart type. You can also search by text inside the chart, for example, if you have charts that mention the iphone, you can search by iphone.

Once you find the desired chart, right click the chart and choose to either add the chart to a blank slide in your presentation, or the entire slide itself. The chart or slide will insert at the point where you cursor is located in your presentation. You can also choose the open the entire file the chart is a part of.

Adding Charts to your Chart Gallery

To add charts to your Gallery, select the slide in your presentation with the chart or charts you wish to add.   In the Mekko Graphics Charts ribbon, click the + sign. You will be prompted to choose whether you wish to add the chart, the slide or the entire presentation. Once you select your desired option, you will be presented with your file hierarchy tree. Click the location or folder where you wish to add the slide.

Managing Your Gallery

Gallery Structure:

Select the file tree button on the upper right-hand side of the Chart Gallery. An outline view of all your folders and files within your gallery will appear. Much like navigating with Windows Explorer, you can click on a subfolder to see the contents of that folder.

Managing Charts Within The Gallery:

Select the + button in the Gallery Section of the Mekko Graphics Chart Ribbon. Select **Manage Files**. From there you can create a new folder, rename an existing folder, create a new file, or delete a file. If you create a new file, a blank presentation will be inserted into the selected point of your file tree.

15.18 Productivity Tools - Tools button

The productivity tools allow you to maximize your efficiency and productivity using Mekko Graphics with tools to help boost proficiency of creating business presentations. Use Mekko Graphics productivity tools to create complex slide layouts without manually moving or resizing any elements. Actions like aligning, resizing, and moving elements make these tasks much less time- and labor-intensive. Inserting Harvey Balls, text headers and other commonly-used elements are now easier than ever. To access **Productivity Tools**, you can click the **Tools** button in the **Mekko Graphics Charts** ribbon to open the **Productivity Task Pane**, or you can go to the Mekko Graphics Tools ribbon to find all the tools listed.

Agenda Slides

Using the agenda element you can easily manage the agenda of your presentation, create a table of contents and add or rearrange individual agenda items. All agenda slides can easily be in sync and maintain consistent formatting as you edit the presentation. In the slide sorter view you can reorder agenda slides or copy, paste and duplicate them in the same manner as normal slides.

Inserting an Agenda

Select **Agenda** from the **Mekko Graphics Tools** ribbon. A new slide is inserted after the current slide which contains a default Agenda slide. You can immediately type your new agenda items, overwriting the placeholder text. The new slide is by default titled “Agenda” which can be changed if desired. If there are no agenda slides in the active presentation, the format for the agenda slide is derived from the Slide Master.

Formatting your Agenda items

The format of your Agenda items will get propagated to all other Agenda slides. For example, if you assign blue and bold text to a highlighted agenda item, all other highlighted agenda items will be formatted in the same way.

Propagating your Agenda slide

To propagate your Agenda to other slides, click the Agenda button again. The number of agenda slides will become the same number of items that are on the selected slide and the content and format of each agenda item will be propagated as well. The format of the highlighted item will be used in the formatting of the highlighted item in the other agenda slides. The formatting of the first non-highlighted item in the agenda item list box will be the formatting for all non-highlighted items in the list boxes on all the agenda slides. Any pictures and text boxes (except for the agenda item list text box) will be copied from the active agenda slide to all other agenda slides.

Harvey Balls

Inserting an element like a Harvey Ball into your presentation is very similar to inserting a PowerPoint shape. To insert a Harvey Ball on a slide, go to the Mekko Graphics Tools ribbon and click the Harvey Ball drop down menu. Then, select the desired harvey ball. You can then select a preset size from the size buttons underneath, or manually resize it like other PowerPoint elements.

Headers and Processes

Inserting a header box or process into your presentation is very similar to inserting a PowerPoint shape. To insert a header box or process on a slide, go to the Mekko Graphics Tools ribbon and click the Value Chain, Text Box, or Header box. Click the down arrow to select the number of that select element you wish to have on the slide (2-6). The elements will automatically insert at the same size and horizontally evenly distributed across the slide.

Arrange Commands

In addition to the PowerPoint alignment options, Mekko Graphics has also included several more arrange commands to make formatting easier. Select two ore more elements on your slide and click the desired action from the productivity tools in the Mekko Graphics Tools ribbon.

Same Width - makes selected objects the same width

Same Height - makes selected objects the same height

Same Size - makes selected objects the same size

Align Horizontal - top aligns all selected objects and distributes them equally between the furthest left and the furthest right

Align Vertical - left aligns all selected objects and distributes them equally between the furthest on the top and the furthest on the bottom

Align Charts' Bottom Margins - adjusts any selected Mekko Graphics charts' bottom margin position to be at the same level on the slide. The first selected chart is used as a master. All additional selected charts comply with the first selected chart's bottom margin.

Align Charts' Left Margin - adjusts any selected Mekko Graphics charts' left margin position to be at the same level on the slide. The first selected chart is used as a master. All additional selected charts align with the first selected chart's left margin.

Align Shapes by Bottom Chart Margin - adjusts the vertical position of the selected shapes containing Mekko Graphics charts to align charts' bottom margins. The first selected chart is used as a master, with all subsequent selected charts adjusting to the first selected chart.

Align Shapes by Left Chart Margin - adjusts horizontal position of selected shapes containing Mekko Graphics charts to align charts' left margins. The first selected chart is used as a master, with all subsequent selected charts adjusting to the first selected chart.

Sharing Slides

Sometimes it is useful to save, email, or print some subset of slides. With Mekko Graphics you no longer need to duplicate the file and then delete unwanted slides.

Email Selected Slides
To email selected slides, simply select the desired slides from the preview pane (use ctrl click to multi-select discontiguous slides) on the left and click **Email**. If you wish to add a timestamp in the filename, check the **Add Timestamp** checkbox. To convert the Mekko Graphics charts to .PNG images, check the **Convert Mekko Graphics charts to .PNG images** checkbox. You can also add the presentation as a .PDF file in your email. If the file is too large to email, you have the option to send it as a zip file.

Save Selected Slides

To send selected slides in your deck, select the desired slides from the preview pane (use ctrl click to multi-select discontiguous slides) and click **Save**. You can add a timestamp to the filename by checking the **Add Timestamp** checkbox. You can also save the charts as .PNG images.

Print Selected Slides

To print selected slides in your deck, select the desired slides from the preview pane (use ctrl click to multi-select discontiguous slides) and click **Print**.

Ungroup and Regroup Charts

You can ungroup Mekko Graphics charts into separate elements on your slide, and then regroup them back to a Mekko Graphics chart. To ungroup a Mekko Graphics chart, select your chart and click the **Ungroup Chart** button in the Mekko Graphics Tools Ribbon. To regroup the chart in order to edit it in Mekko Graphics, click **Regroup Chart**.

Resize Chart

For any chart, you can resize for preset paper sizes. Select your Mekko Graphics chart and then from the Productivity Task Pane, choose the **Resize Chart** drop down menu and select the desired size.

15.19 Resources

There are numerous resources available to you right from within Mekko Graphics.

You can visit our website by clicking our Visit Website button in the Mekko Graphics tab in PowerPoint. Take advantage of all the tools on the website, such as our blog, our forum, support documents, and videos.

Click the Email Support button to email our Mekko Graphics support team. Emailing us from Mekko Graphics will attach a Mekko Graphics diagnostic file to the email which gives support technicians important information to help diagnose the support incident.

The **Help** dropdown menu includes an Ask the Expert feature. You can submit your tough charting questions, and we will help you develop the right chart(s).

The **About** button provides version information and access to our website.

Clicking Register allows you to register your software if it is already activated, and allows you to activate if you are still using the trial version.

Clicking Example Charts will open our Sample Presentation. This deck not only gives examples of the various chart types but also demonstrates their business use.

15.20 Align Charts' Bottom Margins

You can align the bottom margins of multiple charts on the same slide in Mekko Graphics. Clicking this button will adjust any selected Mekko Graphics charts' bottom margin position to be at the same level on the slide. The first selected chart is used as a master. All additional selected charts comply with the first selected chart's bottom margin. Note: Not all adjustments are possible depending on the charts' vertical position and the chart's margin layout. Any charts which are invalid relative to the first selected chart are ignored.

15.21 Align Charts' Left Margins

You can align the left margins of multiple charts on the same slide in Mekko Graphics. Clicking this button will adjust any selected Mekko Graphics charts' left margin position to be at the same level on the slide. The first selected chart is used as a master. All additional selected charts align with the first selected chart's left margin. Note: Not all adjustments are possible depending on the charts' horizontal position and the chart's margin layout. Any charts which are invalid relative to the first selected chart are ignored.

15.22 Align Shapes by Bottom Chart Margin

You can align the bottom margins of multiple charts on the same slide in Mekko Graphics. Clicking this button will adjust the vertical position of the selected shapes containing Mekko Graphics charts to align charts' bottom margins. The first selected chart is used as a master, with all subsequent selected charts adjusting to the first selected chart.

15.23 Align Shapes by Left Chart Margin

Adjust horizontal position of selected shapes containing Mekko Graphics charts to align charts' left margins. The first selected chart is used as a master, with all subsequent selected charts adjusting to the first selected chart.

15.24 Swap positions of two selected objects

Swaps the positions (X, Y, Z) of two selected shapes.

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