## Meta5

## Plot User's Guide

Version 4.3

## Note

Before using this information and the product it supports, be sure to read the general information under "Notices".

## Third Edition (January 2013)

This edition applies to Version 4 Release 3 Modification Level 3 of Meta5, and to any subsequent releases until otherwise indicated in new editions or technical newsletters. Make sure you are using the correct edition for the level of the product.
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## About This Book

This book describes the features of the Plot tool and the process for creating axes and pie graphs.

## Who Should Read This Book

This book is intended for all Meta5 users who need to create graphs for reports or presentations.

Whether you are learning about the Plot tool for the first time or you are familiar with the Plot tool, you can use this user's guide to learn about the Plot tool and find more detailed information about the capabilities of the Plot tool.

## Prerequisite Reading

Before reading this book, read Getting Started with the Meta5 Developer's Desktop

## We'd Like Your Comments

Your feedback is important to us in providing you with the most accurate and highquality information. If you have any comments about this book or any other Meta5 documentation, please visit our Website at:
http://www.meta5.com
There you'll find a feedback page where you can enter comments and send them to us.

## Chapter 1. The Plot Tool

Use the Plot tool to visually present tabular data from other Meta5 tools, including Query, Reporter, Spreadsheet, Transformers, and SQL Entry, as graphs. You can use graphs in reports and presentations to help your audience visualize the data. You can also use the Plot tool with other tools in a capsule application to produce a graph automatically.

You can create two types of graphs with the Plot tool:

- An axes graph, which depicts several sets of data side by side, enabling you to make correlations and show numeric relationships that are difficult to present using only numbers.
- A pie graph, which depicts individual values in proportion to the total of the values.


## An Axes Graph

An axes graph illustrates the data as a numeric correlation or relationship. In this guide, plot refers to one curve, line, bar, or other graphic, and graph refers to the entire group of plots. An axes graph is charted against two axes, the $x$-axis and the $y$-axis.

- The x-axis is typically the horizontal axis of the graph along which values are charted.
- The y-axis is typically the vertical axis of the graph. It has a range of numbers, or scale, against which plots are charted.

The following axes graph depicts the forecasted and actual sales of diet cola in specific regions.


## A Pie Graph

A pie graph illustrates the relationship of a value as a portion of a total value. A pie graph is comprised of slices, each representing a data value from the source icon.

The following pie graph contains slices depicting the percentage of the market share for each cleanser.


## Chapter 2. Getting Started

The Plot tool does not perform data access, but receives data from a database using a source icon. You must copy or move data into the Plot tool to analyze it. After data is in the tool, you can choose the type of graph that presents the data in the best way. This chapter describes how to:

- Copy data to a Plot icon or into the Plot window
- Choose the graph type for presenting your data
- Clear data from the Plot tool
- Cancel changes made to a graph


## Copying Data to a Plot Icon or into a Plot Window

Copy the data you wish to chart from a source icon to a closed Plot icon or into the Plot window. Source icons can be Query, Reporter, Spreadsheet, SQL Entry, and Transformer icons. Source data for the Plot tool must be organized in a tabular format (columns and rows) with one line of headings. If the column or row headings have two lines, only one line displays on the graph.

To copy data to a Plot tool:

1. Open the source icon.
2. Click on the select All button in the source icon or select specific portions of the source icon.
3. Copy the data to the Plot tool.

If you copy data to a closed Plot icon, the icon automatically opens and displays the Plot window, as shown in Figure 1.


## Figure 1. The Plot window

The Plot window is empty until you apply selections in the Plot Controls window that determine how to chart your data.

If you copy data into a Plot tool that already contains data, the new data overwrites the existing data.

After you copy the data into the Plot icon, the desktop message bar displays information about the graph. The message indicates the number of columns, rows, and titles the Plot tool received from the source icon.

To show the size of the data again, select Show Data Size in the Special menu.

The desktop message bar displays the number of rows, columns, and titles in the graph.

## Choosing the Graph Type

After you copy data into a Plot icon, you choose how to depict the data. The Plot tool can produce two graph types: an axes graph and a pie graph. A graph is comprised of several single plots or slices, each representing one column or one
row of source data. The graph choices and their related fields are located in the Plot Controls window.

To open the Plot Controls window, click on Show Controls in the Plot window header.

The Plot Controls window opens as shown in Figure 2. The Graph Type field defaults to the axes graph choice, depicted as points connected by lines.


Figure 2. The Plot Controls window

For more information on creating axes graphs, see "Chapter 4. Creating an Axes Graph," on page 23.

To set the Plot tool to create a pie graph, select the pie graph choice (depicted as a circle with a slice set apart) in the Graph Type field.

The Plot Controls window changes to show the pie graph settings.


The Plot window changes to display an empty pie graph.


For more information on creating pie graphs, see "Chapter 5. Creating a Pie Graph," on page 69.

## Clearing Data

The Clear Data button removes all the data from your graph without affecting the selections made in the Plot Controls window. The Clear Data button is useful when you want to use the same Plot Controls window settings for charting different sets of data.

For example, suppose you set up a complex graph using data from a spreadsheet. You want to chart data from another spreadsheet, using the existing graph as a template.

To clear data from the existing graph:

1. Click on Clear Data to remove the data from the graph.
2. Copy the new data you want to chart from the spreadsheet to the Plot tool. The graph retains the same settings, but it displays the new data from the spreadsheet.

You can also copy new data from the spreadsheet without first using Clear Data to clear the data in the graph. The new data overwrites the existing data.

If you inadvertently clear the data from your graph and you have not closed the Plot icon, you can recover your data by selecting cancel Changes in the Special menu.

## Canceling Changes

The Cancel Changes choice in the Special menu allows you to cancel changes made to a graph, including changes applied in the Plot Controls window.

Suppose you decide to display the unit price data as a bar plot instead of a line plot in the following graph.


You change the line plot charting unit price to a bar plot, and click on the Plot Controls window to apply your changes to the graph.


You decide that the graph looks confusing with two bar plots, and want to change the graph back to display unit price as a line plot. When you select Cancel Changes, the Plot window closes. When you open the Plot icon, the original line plot is restored.

You cannot use Cancel Changes to restore the window to its previous state if you saved changes to your graph by closing the Plot window. After you close the Plot window, the changes are set.

To restore the graph to its state at the last time you closed it, select Cancel Changes.

The Plot window closes, and the graph reverts to the last saved version.

## Important:

If you select Cancel Changes after creating a new graph, and you have not saved changes to the graph by closing the Plot window, you cancel all the changes made and lose the entire graph.

## Chapter 3. Charting the Data

After you copy data into the Plot tool, you decide whether the data is organized in the graph by columns or rows.

Deciding which data to use in your graph is a crucial part of creating a graph that displays the results you want.

This chapter describes how to:

- Determine whether the graph should use column-oriented or row-oriented data
- Chart column-oriented data
- Chart row-oriented data


## Selecting the Data to Chart

Data from a single source can be charted as columns or as rows. Use the Treat Data As field in the Overall Graph page to determine how data is charted in a graph. By default, the Plot tool treats the source data as columns.

Queries and spreadsheets are typically charted as columns. Reports created with the Reporter tool can be charted as either columns or rows.

When you choose to chart the data as column or rows, your choice applies to the entire graph, not just to individual plots or slices. You cannot, for example, create a graph that uses one plot of column-oriented data, and one plot of row-oriented data.

The following spreadsheet shows the difference between data organized as columns and data organized as rows.

|  | Column-oriented data categorized by quarterly sales. |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | 园 | A | B | C | D | E |
|  | 1 | Cheese Product | $\text { \$Sales-1Q } 1994$ | \$Sales-2Q 1994\$Sales-3Q 1994 |  | \$Sales-4Q 1994 |
| Row-oriented | 2 | Swiss | $26,046.00$ | 24,460.00 | 15,879.00 | 19,327.00 |
| data | 3 | Cheddar | 34,928.00 | 28,583.00 | 25,802.00 | 20,877.00 |
| categorized | 4 | Gouda | 15,624.00 | 18,468.00 | 23,997.00 | 18,769.00 |
| product. | 5 | Cream | 38,072.00 | 30,489.00 | 27,325.00 | 25,393.00 |

The following graphs use this spreadsheet for the source data, and show the differences between a graph representing column-oriented data and a graph representing row-oriented data.

If you want to chart the first quarter sales for Swiss and Cheddar cheese, you would treat the data from the source icon as columns.


If you want to chart Swiss cheese sales for the entire year, you would treat the data from the source icon as rows.


When you specify which column or rows are charted in the Plot tool, you affect various field in the graph, as described in Table 1.

Table 1. Plot tool fields

Field
X-Axis Data
Y-Axis Data
Label Data
Pie Data

Affects
X-axis labels of the axes graph
Y -axis values of the axes graph
Slice labels of the pie graph
Data evaluated in the pie graph

The names of the fields automatically change depending on whether Columns or Rows is selected in the Treat Data As field.

## Charting Columns of Data

This section explains how to select a specific data column from the source icon for the Plot tool to use:

- When you are creating an axes graph, you must specify a column in the XAxis Data Column and Y-Axis Data Column fields for the values of the $x$-axis and $y$-axis.
- When you are creating a pie graph, you must specify a column:
— In the Label Data Column field to determine the labels of the slices in a pie graph.
— In the Pie Data Column field to specify the data that is charted.
Each letter in a data column field represents one column of data from the source icon.

To chart a column of data from the source icon, select the letter representing the column you wish to chart.

When you have a large source icon and you want to chart a column whose letter is not shown in a data column field, you must specify the column you wish to chart.

To chart a column not represented in the data column field:

1. Select Other in the Data Column field.

A blank field is displayed.

\section*{| X-Axis |
| :--- |
| \begin{tabular}{\|l|l|l|l|l|l|l|l|l|l|l|l|l|l|}
\hline
\end{tabular}$\|$ |}

2. Enter the name of the column of data you want to chart.
3. Click on Apply.

The following examples show how columns of data are charted in axes and pie graphs.

## Example 1—Axes Graph

This example shows a graph comparing the sales in the first quarter for two different products.


The data charted in this graph came from the following spreadsheet, with column A used as the source for data along the x-axis and column B used as the source for data along the y-axis. You would select the corresponding choices in the X Axis Data Column and Y-Axis Data Column fields.


The titles in column A of the spreadsheet label the x-axis, and the values in column B determine the scale of the $y$-axis.

## Example 2—Pie Graph

Suppose you are making a pie graph using data from a spreadsheet in which column A contains the names of the products you are charting.

| 园 | A | B | C |
| :---: | :---: | :---: | :---: |
| 1 | Cheese Product | \$Sales-1Q 1994 | \$Sales-2Q 1994 |
| 2 | Swiss | 26,046.00 | 24,460.00 |
| 3 | Cheddar | 34,928.00 | 28,583.00 |
| 4 | Gouda | 15,624.00 | 18,468.00 |
| 5 | Cream | 38,072.00 | 30,489.00 |

To label the slices with product names, leave Column A selected in the Label Data Column field.

## Label Data Column <br> A B BC|D|E|F|G|H|IJ|K|L|M|N|O|P|Other

To chart sales for the first quarter, select Column B in the Pie Data Column field.

## Pie <br> Data Column <br> A <br> B 

Setting the Pie Data Column field to $B$ results in a graph that charts dollar sales for the first quarter.


To chart dollar sales for the second quarter, Select Column $C$ in the Pie Data column field.

\section*{Data Column $\begin{array}{r}\mathrm{Pie}\end{array}$ <br> | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Other |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |}



## Charting Rows of Data

This section explains how to select a specific data row from the source icon for the Plot tool to use:

- When you are creating an axes graph, you must specify a row in the X Axis Data Row and Y-Axis Data Row fields for the values of the x-axis and $y$-axis.
- When you are creating a pie graph, you must specify a row:
- In the Label Data Row field to determine the labels of the slices in a pie graph.
- In the Pie Data Row field to specify the data that is charted.

Each number in a data row field represents one row of data from the source icon.
To chart the data as rows, select Rows in the Treat Data As field.
The $X$-Axis Data Column field changes to the $X$-Axis Data Row field, indicating that you are charting rows instead of columns.


To chart a row of data from the source icon:

1. Select the number representing the row you wish to chart.

When you have a large source icon and you want to chart a row whose number is not shown in the data row field, you must specify the row you wish to chart.

To chart a row not represented in the data row field:
2. Select Other . A blank field is displayed.

\section*{X-Axis Data Row <br> $\square$ | 14 | 15 | 16 |
| :--- | :--- | :--- | <br> Other}

3. Enter the row of data you want to chart.
4. Click on Apply.

The following examples show how rows of data are charted in axes and pie graphs.

## Example 1—Axes Graph

This example shows a graph charting the quarterly sales of Swiss cheese for 1994.


The data charted in this graph came from the following spreadsheet, with row 1 used as the source for data along the x -axis and row 2 used as the source for data along the $y$-axis.

| 國 | A | B | C | D | E |
| :---: | :---: | :---: | :---: | :---: | :---: |
| $\begin{aligned} & \text { x-axis row } \xrightarrow{\longrightarrow} 1 \\ & \text { y-axis row } \xrightarrow{\longrightarrow} 2 \end{aligned}$ | Cheese Product | \$Sales-1Q 1994 | \$Sales-2Q 1994 | \$Sales-3Q 1994 | \$Sales-4Q 1994 |
|  | Swiss | 26,046.00 | 24,460.00 | 15,879.00 | 19,327.00 |
| 3 | Cheddar | 34,928.00 | 28,583.00 | 25,802.00 | 20,877.00 |
|  |  |  |  |  |  |


| X-Axis |
| :--- |
| 1 | $\mathbf{2} |$|  |  |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |


The titles in row 1 of the spreadsheet label the $x$-axis, and the values in row 2 determine the scale of the $y$-axis.

## Example 2—Pie Graph

Suppose you are making a pie graph using data from a spreadsheet in which row 1 contains the periods of time you are charting for each product.

| 圂 | A | B | C | D | E |
| :---: | :---: | :---: | :---: | :---: | :---: |
| 1 | Cheese Product | \$Sales-1Q 1994 | \$Sales-2Q 1994 | \$Sales-3Q 1994 | \$Sales-4Q 1994 |
| 2 | Swiss | 26,046.00 | 24,460.00 | 15,879.00 | 19,327.00 |
| 3 | Cheddar | 34,928.00 | 28,583.00 | 25,802.00 | 20,877.00 |
| 4 | Gouda | 15,624.00 | 18,468.00 | 23,997.00 | 18,769.00 |
| 5 | Cream | 38,072.00 | 30,489.00 | 27,325.00 | 25,393.00 |

To label the slices with quarterly periods, leave Row 1 selected in the Label Data Row field.


To chart the quarterly sales for Swiss cheese, select Row 2 in the Pie Data Row field.

| Pie |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ---: | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 |



To chart the quarterly sales for Gouda cheese, select Row 4 in the Pie Data Row field.


After you select the data to chart, you are ready to create your graph.

## Chapter 4. Creating an Axes Graph

When you want to depict several sets of data in a numeric relationship, leave the axes graph choice selected in the Graph Type field.

## Graph Type $\triangle$

The axes graph options allow you to create five different plot types (line, curve, bar, point, and text) and layer them to create a graph. This chapter describes how to:

- Add plots to a graph
- Choose values for the x-axis labels
- Chart data against different axes
- Add a legend to a graph
- Format the graph
- Change the axes of a graph
- Manipulate plots in the depiction area


## Adding Plots to a Graph

After you copy data into the Plot tool and open the Plot Controls window, the Single Plots page is displayed, as shown in Figure 3 on page 24. A blank plot is displayed in the depiction area. The depiction area labels provide information about each plot. The information next to the $X$ and $Y$ labels corresponds to the data from the source icon used for the $x$ - and $y$-axis respectively. The information next to the Legend label corresponds to the data from the source icon that is shown in the legend.


Figure 3. The single plots page
To display data in your graph, the plot type must be something other than blank. To change the blank plot to a different type:

1. Select the plot in the depiction area.
2. Select a choice other than Blank in the Show field.
3. Click on Apply to update the graph.
4. Click in the depiction area; the blank plot changes to the type of plot selected.


After you chart your first column or row of data, you can chart additional data by using the Add Plot button. The Add Plot button creates a new plot, advancing through the source data column-by-column or row-by-row. Each time you add a plot to the graph, it is the same type of plot as the last one you added. You can change the plot type by selecting a different choice in the Show field. You can have up to 16 plots on your graph.

To add a new plot to your graph:

1. Click on the Add Plot button. A new plot is displayed in the depiction area. The Y-Axis Data Column field advances one position, and automatically charts the next column of data from the source icon.

2. Click on Apply to update the graph.

The Plot tool automatically makes selections in the Plot Controls window fields so each plot format is different. For example:

- If you add a line or curve plot, the Line Width and Line Style fields change, and the Y-Axis Data Column field advances one position.
- If you add a bar plot, the Shading and Pattern fields change, and the YAxis Data Column field advances one position.
- If you add a point plot, the Symbol Shape field changes, and the Y-Axis Data Column field advances one position.
- If you add a text plot, the Y-Axis Data Column field advances one position.

When you add plots to your graph, you are actually layering each new plot over the others, and you might accidentally hide a plot. See "Moving a Plot" on page 64 for information about changing the layering of a graph.

If you want to change the column of data charted in a plot you can reset the y-axis to any column letter. To change the data charted in a plot, select a choice in the Y-Axis DataColumn field.

For more information on changing the data charted in a plot, see "Chapter 3. Charting the Data," on page 13.

## Choosing the Plot Type

You can depict your data as a line, curve, bar, point, or text plot. You can also choose not to display data on your graph by using a blank plot. A graphic representation of the plot is displayed in the depiction area of the Plot Controls window. By default, a blank plot is displayed in the depiction area.

To choose the type of plot you want on your graph:

1. Select a choice in the Show field.
2. Click on Apply to update the graph.

The formatting fields in the lower third of the Plot Controls window change depending on the type of plot you select.

The fields for each type of plot are described in the sections about the specific plot. When you select any type of plot except Blank, the Color field is displayed in the lower third of the Plot Controls window. The Color field is described in "Choosing the Color of a Plot" on page 38.

## Blank

If you have a graph that you frequently change for different audiences, select Blank for the data you do not want to display instead of deleting the plot. When a
plot type is blank, the plot is not displayed in the Plot window, and the Plot Controls window does not display any additional formatting options.


Suppose you have a graph that displays data for Swiss, Cheddar, and Gouda cheese.


If you want to temporarily change the graph so that the data for Gouda cheese is not displayed, you would select Blank for the plot charting Gouda cheese. The graph displays the information for Swiss and Cheddar cheese only.


To restore the Gouda cheese plot, select Bars in the Show field.

## Line

To display the plot as a line, select Lines in the Show field and click in the depiction area.

The depiction area changes to show a line plot. The Line Width, Line Style, and color fields are displayed in the lower third of the window.

The Line Width field displays five choices of line widths. The Line Style field allows you to vary the appearance of the line in your plot by providing four line styles: solid, dotted, dotted-dashed, and dashed. The Line Width and Line Style fields default to the first choice.

To change the line width and style for a plot:

1. In the depiction area of the Plot Controls window, select a line plot.
2. Select a choice in the Line Width field.
3. Select a choice in the Line Style field.
4. Click on Apply.

## Curve

To display the plot as a curve, select Curves in the Show field and click in the depiction area.

The depiction area changes to show a curve plot, and the Line Width and Color fields are displayed.

The Line Width field displays five choices of line widths for your curve plot.
To change the line width for a plot:

1. In the depiction area of the Plot Controls window, select a curve plot.
2. Select a choice in the Line Width field.
3. Click on Apply.

## Bar

To display the plot as a bar, select Bars in the Show field and click in the depiction area.

The depiction area changes to show a bar plot. The Shading, Pattern, Outline, and Color fields are displayed in the lower third of the window.


The Shading and Pattern fields provide you with a number of patterns for the bars in a plot, so that each bar plot on your graph can be made unique.

The Plot tool automatically places a thin line around each bar of the graph. You can control the line thickness, or remove it altogether, by selecting a choice in the Outline field.

Each time you add a bar plot to your graph by using the Add Plot button, the Plot tool displays default choices in the Shading, Pattern, and Outline fields. You can override the automatic selections for each bar plot by making your own selections in the Shading, Pattern, and Outline fields.

The Shading field provides five choices for shading bars of the graph. You can select only one choice per bar plot. The Pattern field provides five choices, and you can select as many choices as you wish for each bar plot. The Plot tool layers each pattern on top of the other patterns, producing a unique pattern.

Selecting the darkest choice in the shading field overrides any choices selected in the Pattern field.

To select or change the formats for a bar plot:

1. In the depiction area of the Plot Controls window, select a bar plot.
2. Select a choice in the Shading, Pattern, or Outline fields.
3. Click on Apply.

You can display the bar plots on your graph in a side-by-side or stacked position, with different amounts of spacing by using the Bar Style and Bar Spacing fields in the Overall Graph page.

To go to the Overall Graph page, select Overall Graph in the Display field.
Style: The Bar Style field allows you to change the appearance of the bar plots in a graph. By default, the bars are displayed in a side-by-side position in the graph.

## Bar Style |IL |

Suppose you have the following graph charting the sales for Swiss and Cheddar cheese for the first and second quarters.


You can also use stacked bars to show the increase in sales in the second quarter. To do this, arrange the plots in the depiction area so that the plot charting the second quarter sales is after the plot charting the first quarter sales. For more information on how the order of plots in the depiction area affects a graph, see "Manipulating Plots in the Depiction Area" on page 63.


When you change the bar style to stacked, the plot charting the higher values is stacked on top of the plot charting the lower values, as shown in the following graph. Notice that the order of the titles in the legend also changes.


In a Gantt chart, bar plots are stacked and arranged horizontally to show overlapping time periods.


Spacing: The Bar Spacing field provides five choices for the spacing of side-by-side bars in a graph, ranging from overlapping to widely separated.

## 

The Bar Spacing field defaults to the first choice, which places the bars flush with each other.

Changing the spacing between the bars can make the graph easier to read, or can emphasize certain information in the graph. You might want to try each choice in the Bar Spacing field once, to see how the spacing affects the look of the graph.

## Point

To display a symbol at each data point, select Points in the Show field.

The depiction area changes to show a point plot. The Symbol Size, Symbol Shape, and Color fields are displayed in the lower third of the window.


To change the size and shape of the symbol in the point plot:

1. Select the plot you want to change in the depiction area of the Plot Controls window.
2. Select choices in the Symbol Size and Symbol Shape field.
3. Click on Apply.

## Text

Text plots are usually used to label the point plots on a graph. To display text at each data point in a graph, select Text in the Show field.

The depiction area changes to show a text plot. The Text Data Column, Text Position, and Color fields are displayed in the lower third of the window. In the Text Data Column field, you specify the column from the source icon that contains the text you want to use as a text plot. The Text Data Column field defaults to $A$.

If you are charting rows of data, the Text Data Row field is displayed in the window, and defaults to 1 .


Suppose you want to create the following graph that uses text plots to label the data points.


The data charted in this graph came from the following spreadsheet: column C is used as the source for the bar plots, column $B$ is used as the source for the point plots, and column A is used as the source for the text plots.

| 园 | A | B | C |
| :---: | :---: | :---: | :---: |
| 1 | Region | Sales | Forecast |
| 2 | Western | 1.8 | 1.6 |
| 3 | Eastern | 1.3 | 2.9 |
| 4 | Northern | 2.9 | 2.0 |
| 5 | Southern | 2.4 | 2.3 |

##  <br> Data Column

To choose which column of data the Plot tool uses as a text plot:

1. Select a letter in the Text Data Column field.
2. Click on Apply.

If you have a large source icon and you want to chart a column whose letter is not shown in the Text Data Column field:

1. Select Other in the Text Data Column field. A blank field is displayed.

## Text Data Column <br> $\left.\begin{array}{|l|l|l|l|l|l|l|l|l|l|l|l|l|l|}\hline A & B & C & D & E & F & G & H & I & J & K & L & M & N\end{array}\right)$ <br> Other

2. Enter the column of data you want to use for text labels.
3. Click on Apply.

You can specify the position of the text relative to the data point. If you are using text plots to label point plots, the text can be centered on, to the left of, to the right of, below, or above the data point.

## 

By default, the text is centered on the data point. To change the position of the text relative to the data point:

1. In the depiction area, select the plot you want to change.
2. Select a choice in the Text Position field.

You can also change the typeface and size of the font of text plots. For more information on formatting text, see "Changing the Graph Font" on page 56.
3. Click on Apply.

If you leave the first choice selected in the Text Position field, the text label can cover the data point.

## Choosing the Color of a Plot

When you select Lines, Curves, Bars, Points, or Text in the Show field, the Color field is displayed in the lower third of the Plot Controls window.

The color field provides a color palette, so that you can select a unique color for each plot in the graph.

To select a color from the color palette:

1. Point inside the color field, then press and hold down mouse button 1. The color palette is displayed for as long as you continue to press mouse button 1.
2. Release mouse button 1 on the color you want to use for the plot. The plot color is displayed in the depiction area.
3. Click on Apply to update the graph.

The following conditions apply when selecting a color for your plot:

- Selecting a pattern along with a color for a plot causes the color to display in the pattern, not the background.
- Selecting the white choice in the Shading field overrides any color selection in the color field, but the outline of the bar is in the chosen color.

You can also change the typeface and size of the font of text plots. For more information on formatting text, see "Changing the Graph Font" on page 56.

## Choosing the Values for the X-Axis Labels

The Horizontal X-Axis Labels field allows you to select how the Plot tool uses the data in the source icon to label the $x$-axis. By default, the $x$-axis is the horizontal axis of the graph. The Horizontal X-Axis Labels field automatically changes to the Vertical X-Axis Labels field if you change the graph orientation, as described in "Changing the Orientation" on page 55.

By default, data from the source icon labels the $x$-axis. You can also select integers, dates, or time periods for $x$-axis labels.

## Integers

Suppose you want to chart the following data in a graph, but not display the brand names on the x-axis because of their length.

| 國 | A | B | C |  |
| :---: | :---: | :---: | :---: | :---: |
| 1 | Product | Dollar Sales 1993 | Dollar Sales 1994 |  |
| 2 | Clesco Stain Fighter 16 oz | 55,000.00 | 22,000.00 |  |
| 3 | Clesco Stain Fighter 8 oz | 76,000.00 | 66,000.00 |  |
| 4 | Snapper Stain Eater 8 oz | 36,000.00 | 58,000.00 |  |
| 5 | Snapper Stain Eater 12 oz | 22,000.00 | 12,000.00 |  |

You would select the Blank choice in the Horizontal X-Axis Labels field to label the graph with integers.

## 



To use integers (for example, 1, 2, 3) to label the x-axis of your graph:

1. Select Blank in the Horizontal X-Axis Labels field.
2. Click on Apply. The integers are automatically displayed on the x-axis.

## Data

Suppose you want to use the information in column A of the following spreadsheet to label the x -axis of a graph.

| 园 | A | B | C |  |
| :---: | :---: | :---: | :---: | :---: |
| 1 | Cheese Product | Unit Sales | Dollar Sales |  |
| 2 | Swiss | 65.72 | 343.99 |  |
| 3 | Cheddar | 61.00 | 545.00 |  |
| 4 | Gouda | 63.00 | 250.00 |  |
| 5 | Cream | 62.50 | 492.29 |  |

You would leave Data selected in the Horizontal $X$-Axis Labels field, and select A in the X-Axis Data Column field.

The data in column A of the spreadsheet labels the x-axis of the graph.


To use data from the source icon for the x-axis labels of your graph, leave Data selected in the Horizontal X-Axis Labels field.

When the data from the source icon is text, only some of the labels are displayed on the $x$-axis since there is a standard space allotted for text labels. Numeric data from the source icon is scaled to fit as labels on the x-axis.

For more information about selecting the data to label the x-axis, see "Chapter 3 . Charting the Data," on page 13.

## Date Intervals

You can use days, weeks, months, quarters, and years as the values for the $x$ axis labels. When specifying day, week, and year intervals, you must enter dates in a specific format. If you enter an incorrect date format, the Plot tool does not accept it and reverts to the base date of January 1, 1970. Table 2 lists acceptable date formats for the Plot tool.

Table 2. Date formats

| Date type | Correct format | Incorrect format |
| :--- | :--- | :--- |
| Day, Week, Month | January 15, 1994 | Jan. 15, 1994 |
|  | Jan 15, 1994 | $1-15-94$ |
|  | Jan 15,94 | $1 / 15 / 94$ |
|  | Jan 15, 94 | $1 / 15, ` 94$ |

Table 2. Date formats

| Date type | Correct format | Incorrect format |
| :--- | :--- | :--- |
| Year | 1994 | 994 |
|  | 94 | 1994 |

When you select a date interval for the x-axis of your graph, the Plot tool ignores any time periods that are part of your source data.

Suppose you have a source icon containing the unit sales per month, and you want to chart the monthly unit sales on your graph.

| 囯, | A | B |
| :---: | :---: | :---: |
| 1 | Month | Unit Sales |
| 2 | Jan | 5,346.00 |
| 3 | Feb | 2,153.00 |
| 4 | Mar | 3,227.00 |
| 5 | Apr | 1,568.00 |
| 6 | May | 6,252.00 |
| 7 | Jun | 2,045.00 |
| 8 | Jul | 3,103.00 |
| 9 | Aug | 1,548.00 |
| 10 | Sep | 4,278.00 |
| 11 | Oct | 5,183.00 |
| 12 | Nov | 1,094.00 |
| 13 | Dec | 2,293.00 |

When you create your graph, only the labels Jan and Aug are shown on the x-axis because there is a finite amount of space allotted for text along the axis.


To show the months on the x-axis, you would select Month in the Horizontal X -Axis Labels field.


Suppose you decide that you want to label the data as quarters over three years. You would select Qtr in the Horizontal X-Axis Labels field. The Plot tool
labels the x-axis with quarterly time periods and ignores the monthly time periods in the source icon.


## Days

When specifying day as the values for the x-axis labels, select Day in the Horizontal X-Axis Labels field. The First Day field is displayed in the Plot Controls window, with the current date.

To change the date:

1. Enter the new starting date into the field.
2. Click on Apply.

The x-axis is labeled with every fifth day: $5,10,15$, and so on.

## Weeks

When specifying weeks as the values for the $x$-axis labels, select Week or 4 -Wk in the Horizontal X -Axis Labels field. The First Day field is displayed, with the current date.

To change the date to a new starting date:

1. Enter the new starting date into the field.
2. Click on Apply.

## Months

When specifying months as the values for the x-axis labels, select Month or Bimonth in the Horizontal X-Axis Labels field. The First Month and

Year fields are displayed. The First Month field defaults to $J$ (January). The Year field defaults to the current year.

To change the month:

1. Select the letter that represents the month you want.
2. Click on Apply.

## Quarters

When specifying quarters as the values for the $x$-axis labels, select $Q t r$ in the Horizontal X-Axis Labels field. The First Quarter and Year fields are displayed. The First Quarter field defaults to 12 (first quarter). The Year field defaults to the current year.

To change the quarter:

1. Select the choice that represents the quarter you want in the First Quarter field.
2. Click on Apply.

## Years

When specifying years as the values for the x-axis labels, select Year in the Horizontal X -Axis Labels field. The First Year field is displayed, with the current year.

To change the year:

1. Enter the new year into the field.
2. Click on Apply

## Using @-Variables to Define Dates

When you use the Plot tool in a capsule application, you can use @-variables with assigned values in the capsule's User Input Control window to define dates. The Plot tool automatically retrieves the @-values when data is transferred to the Plot.

To use @-variables to define dates:

1. Define the @-variables in the User Input Control window of the Capsule tool.
2. Select a date interval in the Horizontal X-Axis Labels field.
3. Type the @-variables directly into the Year field, just as you would enter text.
4. Select Get @-Values in the Special menu of the Plot window header or run the capsule application.
The @-values label the x-axis.

Suppose you define @A as March, 1994 in the capsule's User Input Control window. You would type @A into the Year field to label the $x$-axis beginning with March, 1994. This entry overrides the selection in the First Month field.

First Month | $J$ | $F$ | $M$ | $A$ | $M$ | $J$ | $J$ | $A$ | $S$ | $O$ | $N$ |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| Year | @A |  |  |  |  |  |  |  |  |  |



Suppose you decide to change the @-variable definitions, and you define @A as 2Q, and @F as 1996 in the User Input Control window. You would type @A, @F into the Year field to retrieve data for the second quarter of 1996. This entry overrides the selection in the First Quarter field.

See the Capsule User's Guide for information about defining @-variables.

## Charting Data Against Different Axes

The Plot tool automatically assigns values to the $y$-axis based upon the highest and lowest values of the information being charted, and uses the left axis of the graph as a reference when it charts data.

When you change the orientation of your graph from vertical to horizontal, the Plot tool rotates the positions of the $x$-axis and $y$-axis, and uses the top axis of the graph as a reference. See "Changing the Orientation" on page 55 for more information.

To chart two columns or rows of data with very different values, chart one column or row of information against the left $y$-axis, and the other column or row of information against the right $y$-axis.

Suppose you want to create a graph charting two columns of data from the following spreadsheet. You want to depict unit sales using a bar plot and unit price using a line plot.

| 园 | A | B | C |  |
| :---: | :---: | :---: | :---: | :---: |
| 1 | Product Desc | Unit Sales | Unit Price |  |
| 2 | Bagels | 65.72 | 1.09 |  |
| 3 | Muffins | 61.00 | 1.99 |  |
| 4 | Rolls | 22.30 | 0.99 |  |

The highest value in the spreadsheet is 65.72 in the Unit Sales column. The Plot tool uses the value of 65.72 to scale the $y$-axis. The highest value for unit price is 1.99. The large difference between unit sales and unit price data results in the line plot used to chart the unit price information barely registering on the graph.


To better display the unit price data on the graph, the Unit Sales and Unit Price columns must be charted against different $y$-axes. When the unit price data is
charted against the right y-axis, the Plot tool uses the value of 1.99 to scale the right y-axis for the line plot representing Unit Price.


To chart data against a different axis:

1. Select a plot in the depiction area.
2. Select Right in the Axis field of the Single Plots page.
3. Click on Apply.

You might want to add annotations to the graph to point out the information that each axis is charting. For more information on annotating your graph, see "Chapter 6. Adding Titles to the Graph," on page 97.

## Adding a Legend to a Graph

Information transferred to the Plot tool from the source icon is used for legend titles. Each plot in the depiction area has a legend title associated with it. When you add a legend to a graph, the titles are shown in the legend.

When you copy specific portions of a source icon that do not include the column or row headings, the legend is not shown on the graph.

Suppose you are using the following spreadsheet as your source icon.

| 國 | A | B | C |
| :---: | :---: | :---: | :---: |
| 1 | Cheese Product | \$Sales-1Q 1994 | \$Sales-2Q 1994 |
| 2 | Swiss | 26,046.00 | 24,460.00 |
| 3 | Cheddar | 34,928.00 | 28,583.00 |

If you are charting columns of data, the column headings are used to label the plots in the depiction area and as the titles in the legend.



When the first column or row of data in the source icon contains numeric data, the whole column or row is treated as numeric data, and is not used as legend titles. When the column or row headings have two lines, only the first line displays as legend titles.

By default, there is no legend on a graph.
To include a legend:

1. In the Overall Graph page, select Legend in the Show With field.

The Legend Font, Size, Legend ColorVertical Position, and Horizontal Position fields are displayed.


The Legend Font, Size, and Legend Color fields default to your desktop font typeface, size, and the window foreground color specified in the Set Preferences window. The Vertical Position and Horizontal Position fields default to Top and Right, respectively.
2. Click on Apply.

The legend is displayed on the graph.
If you want to change the format of your legend, you can select different choices in the Legend Font, Size, Legend Color, Vertical Position, and Horizontal Position fields. (The choice Plot Colors in the field Legend Color makes the legend text the same color as the single plot it is associated with.)

## Changing the Legend Title of a Plot

You can change the titles for individual plots in the Legend Title field of the Single Plots page.

After you change the legend title of a plot, it is not automatically updated when new data is transferred to the Plot icon. To change the legend title, you must enter a new title in the Legend Title field.

Suppose you want to change the legend of the following graph so that the quarter is emphasized.


To change the legend title of a plot:

1. In the depiction area, select the plot associated with the title you want to change.

2. Type the new title into the Legend Title field.

Legend
2Q \$Sales 1994
3. Click on Apply.

The legend changes in the Plot window.


## Using @-Variables in the Legend

When you use the Plot tool in a capsule application, you can use @-variables with assigned values in the capsule's User Input Control window to generate legend titles. The Plot tool automatically retrieves the @-values when data is transferred to the Plot.

To use @-variables in the legend:

1. Define the @-variables in the User Input Control window of the Capsule tool.
2. Type the @-variables directly into the Legend Title field, just as you would enter text.

The @-variables are displayed in the legend.

3. Select Get @-Values in the Special menu of the Plot window header, or run the capsule application.
The @-values are displayed in the legend.


See the Capsule User's Guide for information about defining @-variables.

## Formatting the Graph

Use the fields in the Overall Graph page, shown in Figure 4, to format the size, orientation, text font, and appearance of the axes graph. You can see the format of your graph change in the Plot window as you specify the settings in the Plot Controls window and click on the Apply button.


Figure 4. The Overall Graph page

## Changing the Size

You can change the size of the graph relative to the size of the printed page with the Size field. You might want to change the size of your graph if you cannot view the entire graph in the Plot window. For example, if the labels on the x-axis of your graph are long, you might want to select Full in the Size field.

By default, the graph is shown one-fourth the size of the printed page in the Plot window and is printed one-fourth the size of the paper, minus the margins.

## Changing the Orientation

The Orientation field allows you to reverse the positions of the x-axis and the $y$-axis of a graph.

By default, the Plot tool charts data in a vertical orientation: the x-axis is the horizontal axis of the graph, and the $y$-axis is the vertical axis.

Suppose you have a graph in which only some of the city names are shown on the $x$-axis because the names in the source icon are lengthy.


You can change the orientation of the graph so that all of the $x$-axis labels are shown.

To change the graph orientation to horizontal:

1. Select the second choice in the Orientation field, depicted as horizontal bars.
2. Click on Apply to update the graph.

Data is now charted horizontally: the x-axis becomes the vertical axis of the graph, and the $y$-axis is the horizontal axis.

When the graph has a horizontal orientation, all of the city names are shown on the x -axis.


When you change the graph orientation, it affects some of the fields in the Plot Controls window. In the top portion of the Plot Controls window, the Horizontal X -Axis Labels field changes to the Vertical x -Axis Labels field. In the Axis field, the choices change to Top and Bottom. In the Axes page, the Top Edge and Bottom Edge fields change to Right Edge and Left Edge.

## Changing the Graph Font

By default, the Plot tool uses the typeface and size formats set in the Set Preferences window for text plots and labels on the axes. You can change the typeface and the size of the font for the graph in the Graph Font and Size fields. For example, if the labels on the $x$-axis are too small to read, select a larger font size in the size field.

To change the font typeface and size for text plots and axes labels:

1. In the Overall Graph page, select a typeface from the Graph Font field.
2. Select a size from the Size field.
3. Click on Apply.

## Adding a Border

The Border field allows you to create a border around your graph by providing four different line thicknesses from which to choose, and one blank choice, which is the default.

When you add a border to the graph, long labels can overlap it. On an axes graph, a legend is always displayed inside the border. You cannot move the border.

The following illustration shows a graph with a border.


## Scaling and Formatting the Axes

This section describes the Axes page of the Plot Controls window and the various ways you can format an axis. The Plot tool automatically uses data from the source icon to label the $x$-axis and scale the $y$-axis of a graph.

The Plot Controls window allows you to change the scale and appearance of the axes. Using the fields in the Axes page, you can:

- Choose an axis to format
- Change the position of the baseline in a graph
- Remove the labels, tick marks, or edge of an axis
- Change the major and minor increments of an axis
- Change the values that are displayed at the top, bottom, left, and right edges of a graph

To see the Plot Controls window, select Axes in the Display field.
The Plot Controls window is displayed, as shown in Figure 5.


Figure 5. The Axes page

## Choosing an Axis to Format

The Display Axis Values For field allows you to choose the axis you want to format.

The position of the axes is determined by the orientation of the graph. By default, the graph has a vertical orientation. The Left and Right choices in the Display Axis Values For field represent the y-axes; the Bottom and Top choices represent the x-axes.

If you change the graph orientation to horizontal, the choices in the Display AxisValues For field have a different meaning. The Left and Right choices in the Display AxisValues For field become the x-axes, and Bottom and Top become the $y$-axes.

To choose an axis to format, select a choice in the Display Axis Values For field.

The lower third of the window changes to display the fields that format the axis.
The graphs shown in the following sections reflect the default settings; the graph has a vertical orientation, and the data is charted as columns.

## Changing the Baseline of a Graph

The Plot tool automatically places a measuring baseline on a graph where the data value is equal to zero. When the bottom of the x-axis is also zero, the baseline overlaps the x-axis and is not shown on the graph. To show a value not equal to zero, you can specify a different value for the baseline.

Suppose you want your graph to show that to break even you must sell 56 bagels and 56 muffins. You can change the value of the baseline to 56 to reflect the break-even point for the sales of bagels and muffins.


To change the value of the baseline:

1. Select Manual in the Baseline field.
2. Enter a new value into the field.
3. Click on Apply.

## Adjusting the Axes Scale

The Plot tool uses the type and range of data from the source icon and the graph orientation to calculate the scale for the axes. You can change the axes scale to focus on a specific area of a graph. When the graph is in a vertical orientation,
you can change the values on the top and bottom edges of the left or right axis and the values on the left and right edges of the bottom axis.

## Top Edge Values

The Plot tool automatically calculates the value for the top edge of each axis by using the highest value from the source data.

To change the value of the top edge of an axis:

1. Select Manual in the Top Edge field. A field is displayed containing the current value for the top edge.
2. Enter a new value into the field.
3. Click on Apply.

## Bottom Edge Values

Most graphs use zero as the value for the intersection of the $x$-axis and $y$-axis. The Plot tool automatically designates 0 as the value for the bottom edges of the left and right axes of a graph containing a bar plot, unless the minimum value in the source icon is less than zero. For all other types of plots, the Plot tool bases the value for the bottom edges of the axes on the information charted in the graph.

To change the value of the bottom edge of an axis:

1. Select Manual in the Bottom Edge field. A field is displayed containing the current value for the bottom edge.
2. Enter a new value into the field.
3. Click on Apply.

## Left and Right Edges Values

When you format the left edge or right edge of the bottom axis, the plots in the graph shift horizontally towards or away from the edges.

To change the value of the left edge or right edge of the bottom axis:

1. Select Manual in the Left Edge or Right Edge field. Fields are displayed containing the current values for the left and right edges.

| Right Edge | Automatic | Manual | 4.40 |
| :---: | :---: | :---: | :---: |
| Left Edge | Automatic | Manual | -0.41 |

2. Enter a new value into the field of the edge you want to change.
3. Click on Apply.

## Changing the Axes Increments

Major increments on axes are steps, and the increments between each step are divisions. The Plot tool places a specified number of divisions between the steps on the axes, depending on the type and range of data from the source icon.


Suppose you want to change the right y-axis of the following graph to show different numeric values.


You would format the right axis by increasing the numeric increments of the steps and reducing the number of divisions between each step.

To change the numeric increments of the steps:

1. Select Manual in the Step field.
2. Enter the new value into the field ( 25 in this example).
3. Click on Apply.

To change the number of divisions between steps:

1. Select Manual in the Divisions field.
2. Enter the new value into the field ( 3 in this example).
3. Click on Apply.

Only the right axis of the graph changes to reflect the new values in the Steps and Divisions fields, because each axis is formatted individually.


## Removing Labels, Tick Marks, and Edges

Each axis is automatically displayed with a ruling edge, tick marks, and labels. You might want to remove the labels and tick marks on an axis to focus on the data in the graph. You format the appearance of an axis in the Show With field.

To remove labels, ticks marks, or the edge from an axis:

1. Select an axis to format in the Display Axis Values For field.
2. Select the element you want to remove in the Show With field.
3. Click on Apply.

The following illustration shows a graph with various components removed from the axes.

Tick marks removed


Labels, tick marks, and edge remove

## Manipulating Plots in the Depiction Area

When you want to change the appearance of a graph, you can copy, move, or delete the plots in the depiction area of the Plot Controls window.

## Copying a Plot

You can copy a plot anywhere in the depiction area to use the original plot formats and settings for a new plot. When you copy a plot, it also charts the same data as the original plot until you select a different column or row of data in the Y -Axis Data Column or Y-Axis Data Row field.

To copy a plot:

1. Select a plot in the depiction area.
2. Copy the plot anywhere in the depiction area.

Unless you select a new value in the $Y$-Axis Data Column or $Y$-Axis Data Row field for the copied plot, there are two identical plots in the graph.

## Moving a Plot

The order of the plots in the depiction area from left to right, top to bottom affects the layering of the graph. You can move the plots in the depiction area to reveal any hidden data, as explained in the following example.

Suppose you create the following graph consisting of a line plot and a bar plot. Because the bar plot was added to the graph after the line plot, the bars cover the line.


To move the line plot in front of the bar plot, you would change the layering of the plots on the graph by moving the line plot to the right of the bar plot in the depiction area.

To move a plot, and change the layering of a graph:

1. Select the plot you want to move.

2. Move the plot to the right in the depiction area.

3. Click on Apply.

The line plot is displayed in front of the bar plot on the graph, as shown in the following illustration.


## Deleting a Plot

You can remove a plot from your graph by deleting a plot from the depiction area. When you delete a plot from the depiction area, you delete all of its settings, and the Plot tool relayers and redraws the graph. The space in the depiction area remains empty until you copy or move a plot into the space or add another plot to the graph

Deleting a plot from the depiction area does not remove the data from the plot tool.

If you want to temporarily remove a plot from a graph, change the plot type to Blank. See "Choosing the Plot Type" on page 27 for more information.

For example, suppose you have a graph that charts the data for three cheese products: Swiss, Cheddar, and Cream.


To change the graph to chart only the data for Swiss cheese and Cheddar cheese, delete the plot charting the cream cheese data from the depiction area.


The Plot tool redraws the graph without the cream cheese data.


If you inadvertently delete a plot from the depiction area, and you have not clicked on the Apply button or closed the Plot Controls window, you can recover the plot by clicking on the Cancel or Reset buttons in the Plot Controls window header.

## Chapter 5. Creating a Pie Graph

When you want to depict individual data values as a portion of the sum of all the data values, select the pie graph choice in the Graph Type field.

The Plot tool automatically sums all the data from a row or column in the source icon, then calculates the percentage of each individual data value in relation to the total data value. You can then create a pie graph by making selections in the Plot Controls window, or setting the Plot tool to automatically make a pie graph. This chapter describes how to:

- Add slices to a graph
- Change the data charted in a slice
- Aggregate slices
- Choose the appearance of a slice
- Format slice labels
- Format the graph
- Manipulate slices in the depiction area


## Adding Slices to a Graph

After you copy data into the Plot tool, select the pie graph choice and open the Plot Controls window, the Single Slices page is displayed, as shown in Figure 6. The depiction area of the Plot Controls window is empty until you add a slice to the graph. You can have up to 16 slices on your graph.


Figure 6. The Single Slices page
The depiction area labels provide information about each slice. The information next to the Row label corresponds to the row from the source icon depicted in a slice. When data is treated as rows, Row changes to Col, which corresponds to the column from the source icon depicted in a slice. The information next to Label corresponds to the data from the source icon that is shown as the label for a slice.

You can create a pie graph manually or set the Plot tool to automatically create a graph.

## Creating a Pie Graph Manually

When you manually create a pie graph, you can select individual slices in the depiction area and change the data and the format for each slice. By default, the Make Pie Graph field in the Overall Graph page is set to Manually.

The slices in the depiction area have a shaded border, indicating that you can select them.

There are two ways to manually create a pie graph:

- The Make Pie Graph button creates an entire pie graph all at once.
- The Add Slice button creates a pie graph one slice at a time.


## Using the Make Pie Graph Button

The Make Pie Graph button is displayed in the Plot Controls window header when you display the Single Slices page.

When you use the Make Pie Graph button to create a pie graph, the Plot tool automatically selects the data, shading, pattern, and color for each slice. After the pie graph is created, you can select individual slices in the depiction area and change the settings.

To make a pie graph all at once, but still be able to control the settings for each slice of the pie, click on the Make Pie Graph button.

The Pie Graph window is displayed, shown in Figure 7.


Start
Data Row


| End |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| Data |

Figure 7. The Pie Graph window
The Start Data Row and End Data Row fields are displayed in the Pie Graph window. The Plot tool charts each row of data as a slice in the pie graph, using the column of data selected in the Pie Data Column field.

The Plot tool automatically selects the row numbers in the Start Data Row and End Data Row fields, based upon the number of rows of data it receives from the source icon. The Plot tool ignores the row containing labels, and refers to the
first row of data as row 1 in the Start Data Row field. The subsequent row references are renumbered.

For example, suppose you want to create a pie graph comparing the first quarter sales of cheese products using data from the following spreadsheet.

| 区 | A | B |
| :---: | :---: | :---: |
| 1 | Cheese Product | \$Sales-1Q 1994 |
| 2 | Swiss | 26,046.00 |
| 3 | Cheddar | 34,928.00 |
| 4 | Gouda | 15,624.00 |
| 5 | Cream | 38,072.00 |
| 6 | Feta | 20,763.00 |
| 7 | Ricotta | 14,825.00 |
| 8 | Parmesan | 30,277.00 |

To make the pie graph all at once, click on the Make Pie Graph button. The Pie Graph window is displayed with selections already made in the Start Data Row and End Data Row fields.


| Start |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| Data Row |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | Other |


|  |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |

The Plot tool ignores the label, \$Sales-1Q 1994, in row 1 and begins charting the data from row 2 . Row 2 is consequently referred to as row 1 in the start Data Row field, and the last row of data (row 8) is referred to as row 7 in the End Data Row field.

When you click on the Apply button or close the Pie Graph window, the Plot tool creates the following graph.


Suppose you decide that you do not want to chart the data for Swiss cheese and Cheddar cheese. Select 3 in the Start Data Row field so that the pie graph begins charting from the third row of data (row 4) in the spreadsheet.




When you click on the Apply button or close the Pie Graph window, the Plot tool recalculates the percentages and creates the following graph.


If you select Rows in the Treat Data As field of the Overall Graph page, the Pie Graph window displays the Start Data Column and End Data Column
fields, and automatically selects the column letters. The Plot tool compares the columns of data in the row selected in the Pie Data Row field.

```
Pie Graph Apply Cancel Reset
```


## 困

## Start S <br> Data Column

| End |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |
|  | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |

For example, suppose you want to create a pie graph comparing the quarterly sales of Swiss cheese using data from the following spreadsheet.

| 國 | A | B | C | D | E |
| :---: | :---: | :---: | :---: | :---: | :---: |
| 1 | Cheese Product | \$Sales-1Q 1994 | \$Sales-2Q 1994 | \$Sales-3Q 1994 | \$Sales-4Q 1994 |
| 2 | Swiss | 26,046.00 | 24,460.00 | 15,879.00 | 19,327.00 |

To make the pie graph all at once, click on the Make Pie Graph button. The Pie Graph window is displayed with selections already made in the Start Data Column and End Data Column fields.


The Plot tool ignores the label, Swiss, in column A and begins charting the data from column B. Column B is consequently referred to as column A in the start Data Column field, and the last column of data (column $E$ ) is referred to as column D in the End Data Column field.

When you click on the Apply button or close the Pie Graph window, the Plot tool creates the following graph.


When you want to create a pie graph and you are finished making selections in the Pie Graph window, click on the Apply button.

Close the Pie Graph window.

## Using the Add Slice Button

The Add slice button is located in the Single Slices page of the Plot Controls window header.

To make a pie by adding one slice at a time, click on the Add slice button once for each slice of the pie graph.

The slices are displayed in the depiction area.


Each time you click on the Add Slice button, the slice Data Row field advances one position, and the Plot tool automatically charts the next row of data from the source icon. The Plot tool also automatically makes selections in the Shading and Pattern fields, which gives each slice a unique pattern needed for black and white graphs.

You can change the appearance of a slice in the pie graph by making selections in the Plot Controls window.

To see the formatting options for a slice, select the specific slice in the depiction area.

The lower third of the Plot Controls window changes, displaying the options for that slice.

For more information about formatting slices, see "Choosing the Appearance of a Slice" on page 84.

## Creating a Pie Graph Automatically

Creating a pie graph automatically is useful when the graph is generated in a capsule application, where data is automatically transferred into the Plot tool.

To set the Plot tool to automatically generate a pie graph:

1. Select Overall Graph in the Display field.
2. Select Automatically in the Make Pie Graph field.

When you set the Plot tool to create a pie graph automatically, the Plot tool charts all of the data from the source icon and formats the slices. The slices in the depiction area have a broken border, indicating that you cannot select them.


To learn about using the Plot tool in a capsule application, see "Using Plot in a Capsule Application" on page 104.

## Changing the Data Charted in a Slice

After you create a pie graph, you might want to change the data that is represented in an individual slice. Use the Slice Data Row field to select specific data from the source icon for the values of the slices in the pie graph. The Slice Data Row field is also useful when you have a large source icon and you want to chart specific rows or columns of information in the pie graph.

The slice Data Row field automatically changes to Slice Data Column when Rows is selected in the Treat Data As field. By default, the Plot tool treats the data as columns.

## Charting Columns of Data

When the first row of data in a source icon includes labels, the Plot tool does not chart the first row when referencing the source icon, but charts the data beginning at the second row. The rows are renumbered in the Plot tool, and the slice Data Row field refers to the first row of charted data as row 1.

When you open the Plot Controls window, the Slice Data Row field is displayed.

Suppose you want to create a pie graph comparing the first quarter sales of some of the cheese products using data from the following spreadsheet.

| 圂 | A | B | C |
| :---: | :---: | :---: | :---: |
| 1 | Cheese Product | \$Sales-1Q 1994 | \$Sales-2Q 1994 |
| 2 | Swiss | 26,046.00 | 24,460.00 |
| 3 | Cheddar | 34,928.00 | 28,583.00 |
| 4 | Gouda | 15,624.00 | 18,468.00 |
| 5 | Cream | 38,072.00 | 30,489.00 |
| 6 | Feta | 20,763.00 | 21,924.00 |
| 7 | Ricotta | 14,825.00 | 16,041.00 |
| 8 | Parmesan | 30,277.00 | 33,823.00 |

To chart the first quarter sales, select $B$ in the Pie Data Column field.
The Plot tool ignores the row containing labels, and refers to the first row of data as row 1 in the Slice Data Row field. The subsequent rows of data are renumbered in the Plot tool.

As you add slices to the graph, the Plot tool ignores the label, \$Sales-1Q 1994, in row 1 and begins charting the data from row 2 . Row 2 is consequently referred to as row 1 in the depiction area and the slice Data Row field, and rows 3 through 8 are referred to as rows 2 through 7 , respectively.


Using the first four rows of data from the spreadsheet results in the following pie graph.


Suppose you want to change the graph so that the sales for Parmesan cheese are charted instead of the sales for Gouda cheese.

To change the data charted in a slice:

1. Select a slice in the depiction area.
2. In the slice Data Row field, select which row of data to assign to that slice. The Plot tool recalculates the percentage value of the slice relative to the other slices in the graph.
3. Click on Apply.

To replace the sales data for Gouda cheese with the sales data for Parmesan cheese, select the slice in the depiction area that represents Gouda cheese.
Because the Plot tool renumbers the rows, select 7 in the Slice Data Row field to chart the data for Parmesan cheese, even though the Parmesan sales data is contained in row 8 of the spreadsheet.



The pie graph now charts the data for Parmesan cheese and recalculates the percentages of the slices in the graph.

## Charting Rows of Data

When the first column of data in a source icon includes labels, the Plot tool does not chart the first column when referencing the source icon, but charts the data beginning at the second column. The Slice Data Column field refers to the first column of charted data as column $A$.

To create a pie graph that charts the information in a specific row of the source icon:

1. In the Overall Graph page, select Rows in the Treat Data As field.
2. Select the Single Plots choice. The Slice Data Column field is displayed in the Single Plots page.

Suppose you want to create a pie graph comparing the quarterly sales of Swiss cheese using data from the following spreadsheet.

| 园 | A | B | C | D | E | F |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 1 | Cheese Product | \$Sales-1Q 1994 | \$Sales-2Q 1994 | \$Sales-3Q 1994 | \$Sales-4Q 1994 | \$Sales-1Q 1995 |  |
| 2 | Swiss | 26,046.00 | 24,460.00 | 15,879.00 | 19,327.00 | 30,602.00 |  |

To chart the sales for Swiss cheese, select 2 in the Pie Data Row field.


As you add slices to the graph, the Plot tool ignores the label Swiss in column A and begins charting the data from column $B$. Column $B$ is consequently referred
to as column A in the depiction area and the Slice Data Column field, and rows $C$ through $F$ are referred to as rows $B$ through $E$, respectively.


Using the first four columns of data from the spreadsheet results in the following pie graph.


Suppose you want to change the graph so that you can compare the sales for the first quarter of 1995 with the last three quarters of 1994.

To change the data charted in a slice:

1. Select a slice in the depiction area.
2. In the Slice Data Column field, select which column of data to assign to that slice. The Plot tool recalculates the percentage value of the slice relative to the other slices in the graph.
3. Click on Apply.

To replace the sales data for the first quarter of 1994 with the sales data for the first quarter of 1995, select the slice in the depiction area that represents 1994
first quarter sales. Because the Plot tool does not chart the first column of data from the spreadsheet, select E in the Slice Data Column field to chart the data for 1995 first quarter sales, even though the 1995 first quarter sales data is contained in column $F$ of the spreadsheet.


The pie graph now charts the sales data for the first quarter of 1995 and recalculates the percentages of the slices in the graph.


## Aggregating Slices

The Plot tool assigns a value of zero to data values that make up less than onehalf percent of the total. When you create a pie graph, the slices representing less than one-half percent are not visible and only the slice labels are displayed.

To show the slices representing less than one-half percent of data in the pie graph, you can aggregate, or combine, several slices into one slice. The Plot tool treats the combined data values as one data value, and charts an aggregate slice in the pie graph that represents the combined data values.

Suppose you are using the following spreadsheet as your data source. The data values in rows 9 through 12 are less that one-half percent of the total value.

| 國 | A | B |  |
| :---: | :---: | :---: | :---: |
| 1 | Cheese Product | Dollar Sales |  |
| 2 | Swiss | 1,026,046 |  |
| 3 | Cheddar | 866,603 |  |
| 4 | Gouda | 518,003 |  |
| 5 | Cream | 418,901 |  |
| 6 | Feta | 317,392 |  |
| 7 | Ricotta | 199,781 |  |
| 8 | Parmesan | 294,786 |  |
| 9 | Gorgonzola | 7,560 |  |
| 10 | Provolone | 4,958 |  |
| 11 | Bleu | 3,805 |  |
| 12 | Mozzarella | 6,381 |  |
| 13 | Monterey Jack | 531,117 |  |
| 14 | American | 142,926 |  |

The slice labels are displayed on the pie graph, but the slices are too small to see.


To show the slices representing Gorgonzola, Provolone, Bleu, and Mozzarella cheeses in the pie graph, you can aggregate the slices into one slice.

To aggregate slices in a pie graph into one slice:

1. In the depiction area, delete the slices you are combining.
2. Select the Add Slice button to add a new slice to the graph.
3. In the Label field, type the label of the new slice.
4. Select Other in the Slice Data Row field.
5. In the new field, type the numbers of the data rows you are combining with a colon separating the beginning and ending row numbers..

Remember that the Plot tool renumbers the columns and rows of source data. By combining slice data rows 8 through 11 in the slice Data Row field, you are actually combining the spreadsheet data in rows 9 through 12. See "Changing the Data Charted in a Slice" on page 77 for more information on how the Plot tool references rows and columns of source data.
6. Click on Apply.

The slices representing Gorgonzola, Provolone, Bleu, and Mozzarella cheeses are aggregated into one slice. The value of the aggregate slice is the sum of the aggregated data values from the source icon.


12\%

When you are generating the pie graph automatically or using the Make PieGraph button and your source icon contains more than 16 data values, sort the slices in descending order so that the smallest values are last. The Plot tool automatically aggregates all the data values after the fifteenth data value into one slice, and labels it Other in the pie graph. For more information about sorting slices, see "Sorting the Slices" on page 92.

## Choosing the Appearance of a Slice

The fields in the Single Slices page allow you to format the appearance of a slice. You can choose a different color or pattern for each slice in your graph. You can also separate a slice from the graph for emphasis.

## Choosing Shading and a Pattern

The Shading field provides five choices for shading slices of the pie graph. You can select only one choice per slice. The Pattern field provides five choices,
and you can select as many choices as you like per slice. The Plot tool layers each pattern on top of the other patterns, producing a unique pattern.

Selecting the darkest choice in the shading field overrides any choices selected in the Pattern field.

To change the shading and pattern of a slice:

1. In the depiction area, select the slice you want to change.
2. Select a choice in the Shading field.
3. Select a choice (or choices) in the Pattern field.
4. Click on Apply.

## Selecting a Slice Outline

The Plot tool automatically places a thin line around each slice of the pie graph. You can control the line thickness, or remove it altogether, by selecting a choice in the Outline field and clicking on the Apply button.

## Choosing a Slice Color

The Color field provides a color palette so that you can choose a unique color for each slice of the pie graph.

To select a color from the color palette:

1. Point inside the color field, then press and hold down mouse button 1. The color palette is displayed for as long as you continue to press mouse button 1 .
2. Release mouse button 1 on the color you want to use for the slice. The slice color is displayed in the depiction area.
3. Click on Apply to update the graph.

The following conditions apply when selecting a color for your slice:

- Selecting a pattern along with a color for a slice causes the color to display in the pattern, not the background.
- Selecting the white choice in the Shading field overrides any color selection in the color field, except for the slice's outline, which reflects your choice of color for the slice.


## Exploding a Slice

To place more visual emphasis on a slice, you can separate, or explode, a slice from the pie graph. The Explode field provides three choices: None, A Little, and A Lot. The Plot tool defaults to None, and no slices are separated from the pie.

Suppose you have the following graph illustrating the quarterly sales of Swiss cheese.


To emphasize the highest quarter sales for the year then select the slice representing first quarter sales in the depiction area and select a choice in the Explode field. The slice is separated from the rest of the pie graph.

Swiss Cheese


There is no limit to the number of slices you can separate from the pie graph.

## Formatting Slice Labels

In the Overall Graph page, the Show With field allows you to format every slice in a pie graph with its name, numeric value, and percentage value. By default, the Plot tool displays the label and percent for each slice.

The Plot tool uses the typeface and size formats specified in the Set Preferences window to label the slices. In addition, it uses the color you have specified as your window foreground color as the color of the labels. You can change the typeface, size, and color of the font in the Label Font, Size, and Label Color fields.

To change the font typeface, size, and color:

1. Select a typeface from the Label Font field.
2. Select a size from the size field.
3. Click on Black or Plot Colors (the text assumes the same color as the slice it is associated with).
4. Click on Apply.

You can also display and format the value assigned to each slice of the pie graph. To show the value of each slice:

1. Click on Value in the Show With field. The Value Precision field is displayed. The default is no decimal precision.

| Show With | Label | Value | Percent |
| ---: | :--- | :--- | :--- |
| Label Font | Helvetica | Size 10 |  |
|  |  |  |  |
| Value Precision | 0 |  |  |

2. From the Value Precision field, select the desired decimal precision.
3. Click on Apply.

The following illustration shows a pie graph displaying the slice labels, data values, and percent of each slice.


If you do not want to display the labels, values, or percents for each slice:

1. Click on the appropriate button in the Show With field to deselect it.
2. Click on Apply to update the graph.

## Changing a Slice Label

The Plot tool automatically uses the data in the source icon to label each slice of the pie graph, as explained in "Chapter 3. Charting the Data," on page 13. You can change individual slice labels in the Label field in the Single Slices page.

Suppose you want to change the label Swiss to be more specific.


To change the label of a slice of the pie graph:

1. In the depiction area, select the slice you want to change.
2. Type the new label into the Label field.

$$
\text { Label } \begin{aligned}
& \text { Swiss Cheese }
\end{aligned}
$$

3. Click on Apply.

The graphic representation of the slice in the depiction area changes to reflect the new label name.


The slice label changes in the Plot window.


## Using @-Variables as Slice Labels

When you use the Plot tool in a capsule application, you can use @-variables with assigned values in the capsule's User Input Control window to generate slice labels. The Plot tool automatically retrieves the @-values when data is transferred to it.

To use @-variables as slice labels:

1. Define the @-variables in the User Input Control window of the Capsule tool.
2. Type the @-variables directly into the Label field, just as you would enter text.

Label @A

The @-variables label the slices.

3. Select Get @-Values in the Special menu of the Plot window header or run the capsule application.
The @-values are displayed on the graph.


See the Capsule User's Guide for information about defining @-variables.

## Formatting the Graph

Use the fields in the Overall Graph page, shown in Figure 8, to format the size, display and sort order for slices, and appearance of the pie graph. You can see the format of your graph change in the Plot window as you specify the settings in the Plot Controls window and click on the Apply button.


Figure 8. The Overall Graph page

## Changing the Size

You can change the size of the graph relative to the size of the printed page with the size field. You might also want to change the size of your graph if you cannot view the entire graph in the Plot window. For example, if the slice labels of your graph are long, you might want to select Full in the Size field.

The size field defaults to $1 / 4$. The graph is shown one-fourth the size of the printed page in the Plot window, and prints one-fourth the size of the paper, minus the margins.

## Choosing the Display and Sort Order for Slices

You can change the start position, charting direction, and sort order of the slices of the pie graph.

## Selecting the Start Position

The start Position field provides four choices for the start position of the slices.

You might want to chart your pie graph trying each position in the start Position field once, to see how each choice affects the look of the pie graph.

## Selecting the Direction

The Direction field allows you to chart the slices in a clockwise or counterclockwise direction. By default, the slices are charted in a clockwise direction.

The choices in the Direction field affect the overall look of the pie graph. You might want to try charting the slices in both directions, to decide which direction produces the most attractive result.

## Sorting the Slices

The Sort Order field provides three choices for sorting the slices you are charting. If you leave None selected, the Plot tool sorts the slices in the order in which they are shown in the depiction area.

You can sort the slices in ascending or descending order.
If you select Ascending, the slice representing the smallest data value is displayed at the start position, followed by the next largest slice, and so on, until all the slices are charted in order of ascending value.
If you select Descending, the slice representing the largest data value is displayed at the start position, followed by the next smallest slice, and so on, until all the slices are charted in order of descending value.

## Adding a Border

The Border field provides settings for a border to enclose the pie graph.
By default, a border is not shown on the graph. The choices in the Border field represent different line thicknesses. If the slice labels are long, they can overlap the border. You cannot move the border.

The following illustration shows a pie graph with a border.


## Manipulating Slices in the Depiction Area

To change the appearance of a graph, you can copy, move, or delete the slices in the depiction area of the Plot Controls window.

## Copying a Slice

You can copy a slice anywhere in the depiction area. This feature is useful, for example, if you set the Shading, Pattern, and Outline fields for a slice and want to use the same settings for another slice. When you copy a slice, it charts the same data as the original slice until you choose a different column or row of data in the Slice Data Column or Slice Data Row field.

To copy a slice:

1. Select a slice in the depiction area.
2. Copy the slice anywhere in the depiction area.


Unless you select a new value in the Slice Data Column or Slice Data Row field for the copied slice, there are two identical slices in the pie graph.


## Moving a Slice

The order of the slices in the depiction area, from left to right, top to bottom, affects the arrangement of slices in a graph. You can move slices in the depiction area to rearrange the display order of slices in the pie graph.

Suppose you create the following pie graph that charts cheese products, including an aggregated slice labeled Other Cheeses.


You decide that you want to move the Other Cheeses slice to the last position in the graph by moving the Other Cheeses slice to the last position in the depiction area.

To move a slice:

1. Select the slice you want to move.

2. Move the slice to the right in the depiction area.

3. Click on the Apply button.

The slice is displayed in the last position in the graph.


## Deleting a Slice

You can remove a slice from your graph by deleting a slice from the depiction area. Deleting a slice from the depiction area is useful when you want to remove a single slice from a graph that is composed of many slices. When you delete a slice, you delete all of its settings, and the Plot tool recalculates the percentage value of the remaining slices and redraws the pie graph.

Suppose you have a pie graph that charts the data for many cheese products.


You decide that you do not want to chart the data for American cheese. You would delete the slice charting the American cheese data from the depiction area.

The Plot tool redraws the graph without the American cheese data and recalculates the percentage of each slice.


The space in the depiction area remains empty until you copy or move a slice into the space or add another slice to the graph.

If you delete a slice from the depiction area inadvertently, and you have not clicked on the Apply button or closed the Plot Controls window, you can recover the slice by clicking on the Cancel or Reset buttons in the Plot Controls window header.

## Chapter 6. Adding Titles to the Graph

After you finish creating your graph, you might want to add a title or annotation to it. You can place the current date, a confidential label, or the title of a report on the graph. This chapter describes how to:

- Add a title to the graph
- Format the text in the title frame
- Set the options for the title when it is printed
- Copy and move the title frame


## Adding a Title

When you add a title to a graph, it is contained in a frame you can move, copy, resize, and delete.

To add a title to your graph:

1. Click anywhere in the Plot window. A title frame is displayed with an insertion point, indicating where text is entered.
2. Type text into the title frame. The text is displayed centered in the title frame.

$$
\text { Cheese Sales for May } 1994
$$

To enter multiple lines or paragraphs of text into the title frame:

1. Press Enter to begin a new paragraph.
2. Press Shift+Enter to begin a new line.

You can also copy or move text from another icon, such as a spreadsheet or text document, into the title frame, or use @-variables as described in "Using @Variables in Titles" on page 98.

## Resizing the Title Frame

As you enter text into the title frame, the lines of text are not displayed when they reach the border and wrap within the frame. You can see all of the text by expanding the title frame.

To see all the text in the title frame:

1. If the border is not visible, press and hold down mouse button 1 , and slide the pointer toward the text. The title frame is displayed with a handle in each corner.

## Cheese Sales for May 1994

2. Press the Size function key.
3. Click and hold on one of the handles, and drag the handle until the frame is the desired size.

## Using @-Variables in Titles

When you use the Plot tool in a capsule application, you can use @-variables with assigned values in the capsule's User Input Control window to generate titles for your graph. The Plot tool automatically retrieves the @-values when data is transferred to it.

To use @-variables in titles:

1. Define the @-variables in the User Input Control window of the capsule tool.
2. Type the @-variables directly into the text frame in the Plot window, just as you would enter text.

> @D Total Sales for @A

Be sure to make the title frame large enough to accommodate the @-values.

The @-variables is displayed in the graph titles.
@ D Total Sales for @A

3. Select Get @-Values in the Special menu of the Plot window header or run the capsule application.
The @-values is displayed on the graph.
Cream Cheese Total Sales for New York


If you click in the title frame when the @-values are displayed, the @-variables are redisplayed. Select Get @-Values to show the @-values again.

## Formatting the Title

The Title Options window provides options for the title when displaying and printing your graph. The Title Options window allows you to:

- Add a border to the title on your graph
- Choose if the title frame is transparent or opaque when it is printed

To format the title, click on the title frame so that the handles are visible, and open the Title Options window, shown in Figure 9.


Figure 9. The Title Options window

## Adding a Border

The Border field allows you to create a border around the title in your graph by providing four line thicknesses from which to choose, and one blank choice, which is the default.

A title frame with a border is displayed on the graph in the following illustration.


## Choosing the Printed Appearance of the Title

If you place a title on top of the graph, you can use the Print As field to specify how you want the title to display when you print the graph.

## Print As <br> Transparent Opaque

The Print As field provides two choices:

- The Transparent choice prints the title on the graph with a transparent background, showing the graph through the title.

- The Opaque choice prints the title on a white background, hiding the graph behind the title.


Cheese Sales for May 1994 Eastern Region


By default the title is printed on a transparent background, but the title always is displayed opaque in the Plot window.

If you have a title on your graph that prints transparently, and you decide that the title needs to be more visible, select Opaque in the Print As field to print the title on a white background.

## Formatting the Text in the Title Frame

To format the text in a title frame:

1. Select the text inside the frame (not the frame itself).
2. Open the Text Options window.


The Text Options window provides you with character and paragraph formatting fields. For information on formatting text, see the Text User's Guide.

## Copying and Moving the Title Frame

By pressing the Copy or Move function keys or by using the pop-up function pad, you can copy or move a title frame anywhere inside the Plot window or to another Plot window. For example, if you change a graph's orientation, the title frame is not automatically repositioned, and you might need to move the title frame. When you copy or move a title frame, the Plot tool places the center of the frame at the point you select in the Plot window.

When you move the title to another location on the graph, make sure to select and move the frame, rather than just the text. If you move the text without the frame to another location, a new frame is created for the text, and a frame also remains at the original location on the graph.

## Chapter 7. Using Plot with Other Tools

The Plot tool can be used with a variety of Meta5 tools. This chapter describes how to use:

- Other tools as source icons
- Plot results with other tools
- The Plot tool in a capsule application


## Using Other Tools as Source Icons

The following Meta5 tools can be used as source icons for the Plot tool:

- Query
- Spreadsheet
- SQL Entry
- Reporter
- Transformers
- Clipboard

You can choose to transfer all or part of the data from the source icon to the Plot tool. Meta5 tools that transfer data in a unique way are described in the following sections.

## The Reporter Tool

In a Reporter tool, you can copy data from the report window to Plot. For example, to copy an entire report to a Plot icon:

1. Open a Plot icon on your desktop.
2. Open a Reporter icon and display the report window. Be sure that the report window, not the set-up window, is displayed. The select All button does not select data in the set-up window.
3. Click on the Select Allbutton.

All the data in the report is highlighted.
4. Copy the data into the Plot window.

Headings in the Reporter tool can be compressed, expanded, or indented. When copying data from the Reporter tool to the Plot tool, the headings should be compressed if you want the labels on the graph to contain all of the information.

See the Data Access Tools User's Guide for more information about headings in the Reporter tool.

## The Clipboard Tool

Only DIF data can be transferred from the Clipboard icon to the Plot tool. For information about transferring data from the Clipboard tool to a Plot tool, see the Getting Started with the Meta5 Developer's Desktop.

## Using Plot Results with Other Tools

When you finish creating your graph, you can copy the results from the Plot window to another tool, or transfer the results from a Plot icon to another Meta5 tool in a capsule application. The following Meta5 tools can be used to receive graphs from the Plot tool:

- Text
- Clipboard


## The Text Tool

When you complete your graph, you can copy the results from the Plot window into a Text window for further enhancement. You can also transfer a graph from a Plot tool to a Text tool region within a capsule application. For information about preparing the Text tool for Plot graphics, see the Text User's Guide.

## The Clipboard Tool

If you want to use a graph in a workstation-based text tool, you can copy the Plot icon to a Clipboard icon. The Plot results are stored in the Clipboard icon in BMP format. For more information about transferring data to workstation applications, see Getting Started with the Meta5 Developer's Desktop.

## Using Plot in a Capsule Application

Within a capsule application, data is automatically transferred from tool to tool. The Plot tool can be used in a capsule application with other tools, so that after you create and format a graph, you can chart data from different sources in the graph. For example, if you create a graph to chart a monthly budget, you can change the source icon monthly, but always use the same graph.

To use the Plot tool in a capsule application:

1. Copy a previously formatted Plot icon into the capsule window.
2. Copy the source icon into the Capsule window.
3. Connect the source icon to the Plot icon.
4. Select the Run button in the Capsule window header.

If you are creating a pie graph, you can set the Plot tool to automatically generate and format a graph by selecting Automatically in the Make Pie Graph field.

The following capsule application contains a Spreadsheet icon as the source for the Plot icon, and a Text icon as the destination for the completed graph.


You can use @-variables with assigned values in the capsule tool's User Input Control window to generate dates, titles, and labels for graphs. The Plot tool automatically retrieves the @-values when data is transferred to it. See the Capsule User's Guide for information about defining @-variables.

When you use the Plot tool in a capsule application, you can copy a Plot icon to a PC Directory icon and specify the Plot results to be PCX, TIF, or BMP format. See Getting Started with the Meta5 Developer's Desktop for more information.

## Chapter 8. Troubleshooting

In some instances, creating a graph with the Plot tool can produce unexpected results. This chapter lists some of the more common problems you might encounter and provides solutions and recommendations.

This chapter does not cover all possible situations that could affect your graph. If the problem you are experiencing is not listed here, or if a recommendation does not seem to work, contact your system administrator. For more detailed information about error messages, see the Messages and Codes book, or ask your system administrator.

The problems described in this chapter are arranged according to the task you are performing:

- Charting data
- Creating an axes graph
- Creating a pie graph
- Formatting graphs
- Using colors in overall graphs


## Charting Data

This circumstance can occur after you transfer data into the Plot tool.
Problem: The data you want to chart is not displayed in the graph.
Suggestion: When you transfer data into a Plot tool, you decide if the data is organized by columns or rows. See "Chapter 3. Charting the Data," on page 13 for more information.

## Creating an Axes Graph

Any of these circumstances can occur when creating an axes graph.

## X-Axis Labels

Problem: All of the text labels are not shown on the x-axis.
Suggestion: There is a standard space allotted for text labels from the source data. Change the graph orientation to horizontal. Shorten the text labels in the source icon.

Problem: The x-axis time intervals do not change when you transfer new data into the Plot tool.

Suggestion: Check that Data is selected in the X-Axis Labels field.
Problem: The wrong dates are displayed on the x-axis.
Suggestion: Verify that the correct date is in the First Day field.

## Plots

Problem: After adding a plot to your graph, the data is not displayed in the Plot window.

Suggestion: By default, the Show field in the Single Plots page is set to Blank. Select a plot type from the Show field (Curves, Lines, Bars, Points, or Text), and click on the Apply button.

Problem: A plot you charted is not displayed on the graph.
Suggestion: Chart the plot against a different axis.
Problem: A plot is displayed as a 45-degree line.
Suggestion: Chart the plot against a different axis.
Problem: A bar plot overlays a line plot.
Suggestion: The order of the plots in the depiction area determines the layering of a graph. Change the layering of your graph so that the line plot is charted after the bar plot. To do this, move the line plot to the right of the bar plot in the depiction area.

Problem: The bar widths increase when you transfer new data into the Plot tool.
Suggestion: The bar widths are determined by the Plot tool, and you cannot change them. Select a different choice in the Bar Spacing field in the Overall Graph page to add or subtract space between the bars.

## Legends

Problem: The legend does not change when you transfer new data into the Plot tool.

Suggestion: If the Plot tool is inside a capsule application and an @-variable has been defined in the User Input Control window, it overrides the incoming data. Delete any @-variables in the Legend Title field.

Problem: The legend overlays part of the graph.
Suggestion: For some quarter-page and half-page graphs, the legend always overlays part of the graph. Reposition the legend by selecting a different position
for the legend in the Horizontal Position and Vertical Position fields in the Overall Graph page. Shorten the text used as legend titles.

Problem: The legend is not displayed when you clear the data from the graph.
Suggestion: Click on Legend in the Overall Graph page to deselect it.
Problem: Titles in the legend field remain when you clear the data from the graph.

Suggestion: When you manually change a title of a plot in the Legend Title field, it remains in the legend. Select the plot associated with the title, and delete the text from the Legend Title field.

Problem: The legend is not displayed when you copy specific columns or rows of data to the Plot tool.

Suggestion: Column and row names in the source icon are used for the legend titles. Copy the row or column that contains the titles to the Plot tool along with the rest of the data.

Problem: The legend is not displayed on the graph.
Suggestion: If the first column or row of data in the source icon contains numeric data, the whole column or row is treated as numeric data, and is not used for legend titles. Replace the numeric data in the first column or row with text.

Problem: Duplicate legend titles are displayed on a graph.
Suggestion: Delete the legend title of one of the plots on the graph.

## Creating a Pie Graph

Problem: Some of the slices are not displayed on the pie graph.
Suggestion: If the slices represent less than one-half percent of the total data value, only their labels are displayed on the graph.

Suggestion: There are more than sixteen slices in the pie graph. Aggregate the slices into one slice.

## Formatting Graphs

Problem: A slice or plot label is truncated in the Plot window.
Suggestion: When you print the graph, the entire label is displayed.
Problem: A title frame is displayed when you click in the Plot window.
Suggestion: Click on the edge of the frame so that the handles are visible, and delete it.

Problem: You cannot move the title frame to the position you want in the Plot window.

Suggestion: You cannot move a title frame over an existing title frame. Select the existing title frame, and delete it or move the existing title frame to a different position.

Problem: You make changes to a graph inadvertently.
Suggestion: If you have not closed the Plot window, select Cancel Changes in the special menu.

Problem: You deleted a plot or slice inadvertently.
Suggestion: If you have not closed the Plot Controls window or clicked on Apply, click on Cancel or Reset.

## Using Colors in Overall Graphs

Problem: The color of labels and legends is not what you expected.
Suggestion: The default color labels and legends might be set to black. You can change this color, as described in "Choosing the Color of a Plot" on page 38 and "Formatting Slice Labels" on page 86.

For axes graphs, the Graph Color field on the Overall Graph page determines the color of the labels, tick marks, and axes. You have two choices:

- Windows Foreground Color, which prints in gray scale on printers that do not support color.
- Black.

For pie graphs, the Label Color field on the Overall Graph page determines the color of the labels. You have three choices:

- Windows Foreground Color, which prints in gray scale on printers that do not support color.
- Black.
- Plot Colors, in which the labels are the same color as the slice they are associated with, and, like the windows foreground color, also print in gray scale on printers that do not support color.


## Appendix A. Commonly Used Graphs

This appendix contains examples of commonly used graphs:

- A pie graph
- A layered graph
- A text and data point graph
- A Gantt chart

The examples consist of the source data and the steps used to build the graphs.

## Pie Graph

The spreadsheet for the pie graph is shown in the following illustration.

| 凅 | A | B | C |  |
| ---: | :--- | ---: | ---: | ---: |
| 1 | Product | Dollar Sales 1994 | Dollar Sales 1993 |  |
| 2 | Clesco Stain Fighter 16 oz | $55,000.00$ | $22,000.00$ |  |
| 3 | Clesco Stain Fighter 8 oz | $76,000.00$ | $66,000.00$ |  |
| 4 | Snapper Stain Eater 8 oz | $36,000.00$ | $58,000.00$ | - |
| 5 | Snapper Stain Eater 12 oz | $22,000.00$ | $12,000.00$ |  |

To create a pie graph:

1. Copy the source data into a blank Plot icon.
2. Select the pie graph choice.
3. Chart the slices in descending order, beginning at the 3:00 position.
4. Click on the Make Pie Graph button to automatically create the pie graph.

The finished pie graph is shown in Figure 10 on page 112.


Figure 10. A pie graph

## Layered Graph

The spreadsheet for the layered graph is shown in the following illustration.

| 园 | A | B | C |
| :---: | :---: | :---: | :---: |
| 1 | Period | Dollar Sales | Unit Sales |
| 2 | Jan 1994 | 929,434 | 315 |
| 3 | Feb 1994 | 819,791 | 556 |
| 4 | Mar 1994 | 551,120 | 195 |
| 5 | Apr 1994 | 708,073 | 280 |
| 6 | May 1994 | 801,863 | 480 |

To create a layered graph from the spreadsheet:

1. Copy the source data to a blank Plot icon.
2. Change the graph orientation to horizontal.
3. Add a bar plot.
4. Add a line plot.
5. Chart the line plot against the bottom axis.
6. Add a legend.
7. Remove the labels and tick marks from the right axis.
8. Label the top and bottom axes.

The layered graph is shown in Figure 11 on page 113.

## Dollar Sales



Figure 11. A layered graph

## Text and Data Point Graph

You can label each point in a graph if the first column of your source icon contains text instead of numeric data.

The following spreadsheet contains regional sales and forecast information you can use for a text and data point graph. In this example, column A of the spreadsheet is plotted as text data points, column $B$ is plotted as numeric data points, and column C is plotted as bars.


To create a text and data point graph:

1. Copy the source data to a blank Plot icon.
2. Add a bar plot charting the forecast data for each region.
3. Add a point plot charting the sales in each region.
4. Add a text plot to label the data points. Use the region names for the point labels.
5. Position the text labels so that the labels and the data points are visible.
6. Delete the text plot legend title.
7. Add a legend.
8. Remove the labels and tick marks from the top and bottom axes.

The text and data point graph are displayed in Figure 12.


Figure 12. A text and data point graph

## Gantt Chart

Gantt charts are useful in planning schedules and milestones for a project or task.
The spreadsheet for the Gantt chart example contains formulas that calculate project information for each task:

- The start date
- The number of workdays required
- The due date
- The status, in percentages
- The days currently completed
- The actual completion date

The spreadsheet calculates the due date based upon the number of days required for the task.

| 䫆 | A | B | C | D | E | F | G |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 1 | Task | Start Date | Workdays | Projected Completion | Status | Days Effort | Date Completed |
| 2 | Project Duration | =January 1, 1994 | $=112$ | =April 3, 1994 | $=20$ | $=22$ | =January 23, 1994 |
| 3 | Orientation | =January 1, 1994 | 2 | =January 3, 1994 | 100 | 2 | =January 3, 1994 |
| 4 | Systems Planning | =January 3, 1994 | 10 | =January 13, 1994 | 100 | $=10$ | =January 13, 1994 |
| 5 | Pre-Systems Design | =January 13, 1994 | 15 | =January 28, 1994 | 50 | $=8$ | =January 20, 1994 |
| 6 | Functional Specs | =January 13, 1994 | 10 | =January 23, 1994 | 25 | 3 | =January 15, 1994 |
| 7 | Technical Specs | =January 28, 1994 | 10 | =February 7, 1994 | 0 | $=0$ | =January 28, 1994 |
| 8 | Coding | =February 7, 1994 | 15 | =February 22, 1994 | 0 | $=0$ | =February 7, 1994 |
| 9 | Testing | =February 22, 1994 | 20 | =March 14, 1994 | 0 | $=0$ | =February 22, 1994 |
| 10 | Systems Test | =March 14, 1994 | 10 | =March 24, 1994 | 0 | $=0$ | =March 14, 1994 |
| 11 | Training | =March 14, 1994 | 15 | =March 29, 1994 | 0 | $=0$ | =March 14, 1994 |
| 12 | Conversion | =March 29, 1994 | 3 | =April 1, 1994 | 0 | $=0$ | =March 29, 1994 |
| 13 | Switch-Over | =April 1, 1994 | 2 | =April 3, 1994 | 0 | $=0$ | =April 1, 1994 |

To create a Gantt chart:

1. Copy the spreadsheet information to the Plot icon.
2. Add a white bar plot with no outline charting the start dates for each task. The bar plot is not visible on the graph.
3. Delete the legend title for the bar plot.
4. Increase the size of the graph.
5. Change the graph orientation to horizontal.
6. Change the bar graph style to stacked.
7. Add a shaded bar plot charting the days of effort for each task.
8. Add a white bar plot charting the projected completion date of each task in the project.
9. Add a legend.
10. Add the title in 12 point bold Palatino. Underline the title.

The Gantt chart is shown in Figure 13.

## Project Status



Figure 13. A Gantt chart

## Glossary

This glossary defines terms that are used in this book and throughout the Meta5 library. If you do not find the term you are looking for, see the index of this book.
@-variable. A control variable used to represent a value in any tool that can be run inside a capsule application. These values are frequently used as constraints and variable titles in the Query, Plot, Spreadsheet, Layout, and other Meta5 tools.
axis. One of the horizontal or vertical reference lines relative to which data values are charted on an axes graph.
baseline. The primary reference line for an axes graph. The baseline usually represents a data value of zero.

Capsule. A tool in which you build an automated processing sequence using other icons.
capsule application. An automated processing sequence built within a Capsule tool. Typical uses for capsule applications include running standard reports or processing changing data in standard ways.
color palette. A window in which colors can be selected for a plot, slice, or desktop object.
column. (1) A vertical field in a table. Columns may be identified by letters or text strings at the top of the display area. (2) A vertical field in a spreadsheet. Columns are identified by letters at the top of the display area.
data column. A column of data from a source icon used by the Plot tool to determine values in a graph.
data row. A row of data from a source icon used by the Plot tool to determine values in a graph.
depiction area. In the Single Plots or Single Slices page of the Plot Controls window, the middle third of the window, which displays a picture of each plot or slice in the graph that has been constructed.
display area. The area below the Plot window header into which the user can copy data to be charted and where the final graph is displayed.
division. An increment between each step.
explode. To separate a slice from the other slices in a pie graph to make the slice more visible or to place more visual emphasis on the slice.
field. In a window, an identifiable area where the user can enter information, select a choice, or view information.

Gantt Chart. A time-based graph designed for comparing rates, planning schedules, and tracking milestones for a project or task; for example, planned production versus actual production.
graph. A graphic representation of quantitative information comparing one or more sets of variable data. The Plot tool can be used to create pie (circular) and axes graphs.
legend. An explanatory caption included with a graph to identify what each plot represents.
message bar. The rectangular area along the bottom of the desktop, where advisory or error messages are displayed.
page. (1) In a window, an alternate view that provides a different set of options for setting controls and defining the behavior of an icon. (2) In a window, the amount of information that can be displayed at one time.
plot. A graphical representation of one row or column of numerical values.
row. (1) The horizontal component of a table. A row contains exactly one value for each column of the table. (2) A record, or single instance, in a database table. (3) A horizontal field in a spreadsheet, identified by a row number.
scale. The range of values assigned to an axis and used for charting data on a graph. The Plot tool automatically scales each numeric axis of a graph to best display the data charted on it.
slice. A section of a pie graph that represents an individual data value.
source icon. An icon used to pass information to other icons.

Spreadsheet. A tool used to perform calculations and analyses, schedule projects, and perform iteration in embedded capsules.
step. A major increment on an axis.
tick marks. Short lines that intersect an axis to mark steps and divisions.
title frame. A transparent rectangle containing text that the user types directly into the Plot window.
x-axis. The horizontal line at the bottom of a graph, used to chart values.
$y$-axis. The vertical line at the left of a graph, used to chart values.

## Meta5 Publications

This section lists Meta5 publications. To order copies of the books listed here, or to get more information about a book, see your Meta5, Inc. representative.

- Meta5 Volume 1

Getting Started with the Meta5 Developer's Desktop
PC Integration Tools

- Meta5 Volume 2

Spreadsheet User's Guide
Plot User's Guide

- Meta5 Volume 3

Text User's Guide
Layout User's Guide

- Meta5 Volume 4

Capsule User's Guide
BASIC Tool User's Guide

- Meta5 Volume 5

Data Access Tools User's Guide

- Meta5 Volume 6

Forms User's Guide

- Meta5 Volume 7

Transformers Guide

- Meta5 Volume 8

Error Messages and Codes

- Meta5 Volume 9

Installing Meta5 LAN Components
System Administration Guide and Reference

- Meta5 Volume 10

Database Gateway Services Guide
Administering Databases with Meta5

- Meta5 Volume 11

Installing and Configuring Meta5 Open Clients
Developing Applications with Open Data Access Service

- Meta5 Volume 12

Administering Host Services for MVS:DB2 and Cooperative Application Services
Planning and Installing Host-to-LAN Communications for MVS

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