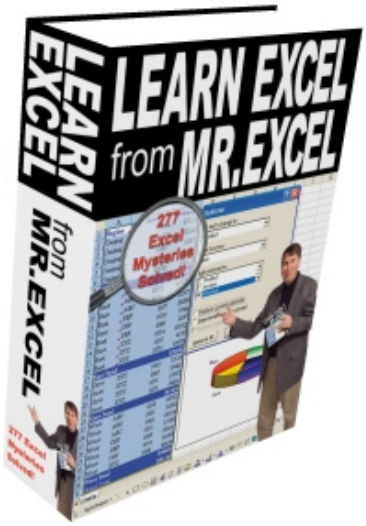

Free Preview – Week #24
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This week - five topics on charting.
The topic on adding new data to an existing chart is one of my favorites.

CREATE A CHART WITH ONE CLICK

Problem: You have to create a bunch of charts. You usually select all of the defaults in the Chart Wizard. Can you speed up the process?

Strategy: You can create a chart with one keystroke! Select the data, including the headings and row labels, as shown in Fig. 1064.

	A	B	C	D	E	F
1						
2		Jan-06	Feb-06	Mar-06	Apr-06	May-06
3	East	12,000	13,200	14,520	15,972	17,569
4	Central	17,000	19,550	22,483	25,855	29,733
5	West	8,000	8,400	8,820	9,261	9,724

Fig. 1064

Press the F11 key. The data is charted on a new chart sheet, as shown in Fig. 1065.

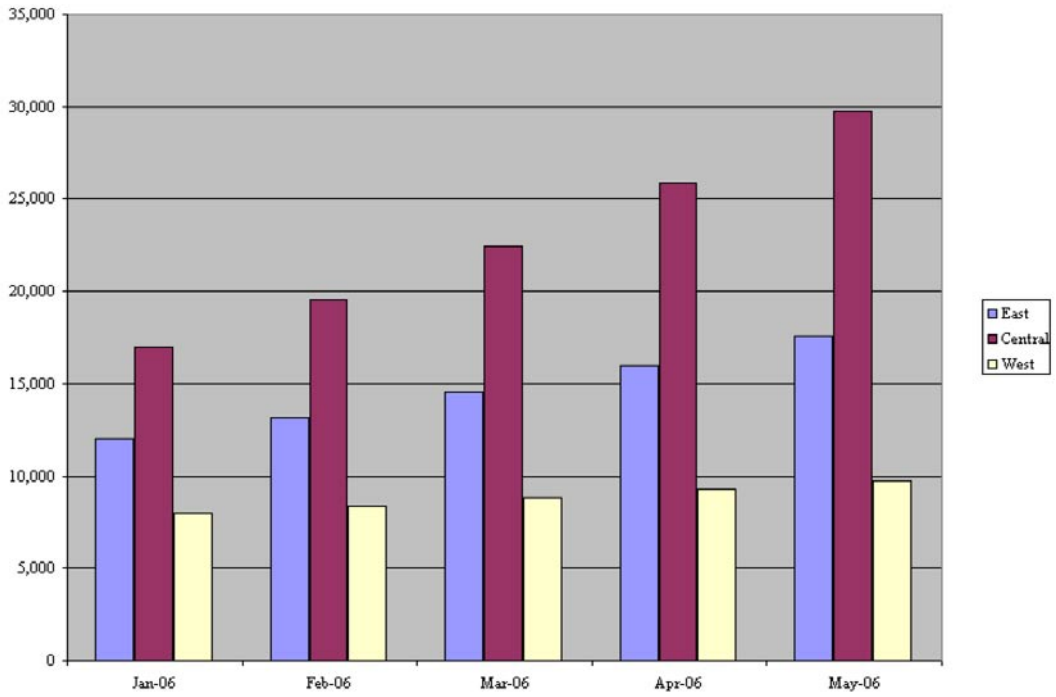

Fig. 1065

Caution: *If your data includes dates as labels, the upper left corner cell of the data range should be blank. Do not include a heading such as "Date" there.*

Additional Details: You can change the type of chart created with the single keystroke. While a chart is active, choose Chart – Chart Type. Select a Chart type and choose the button for Set as Default Chart, as shown in Fig. 1066. All future one-click charts will be created as this type.

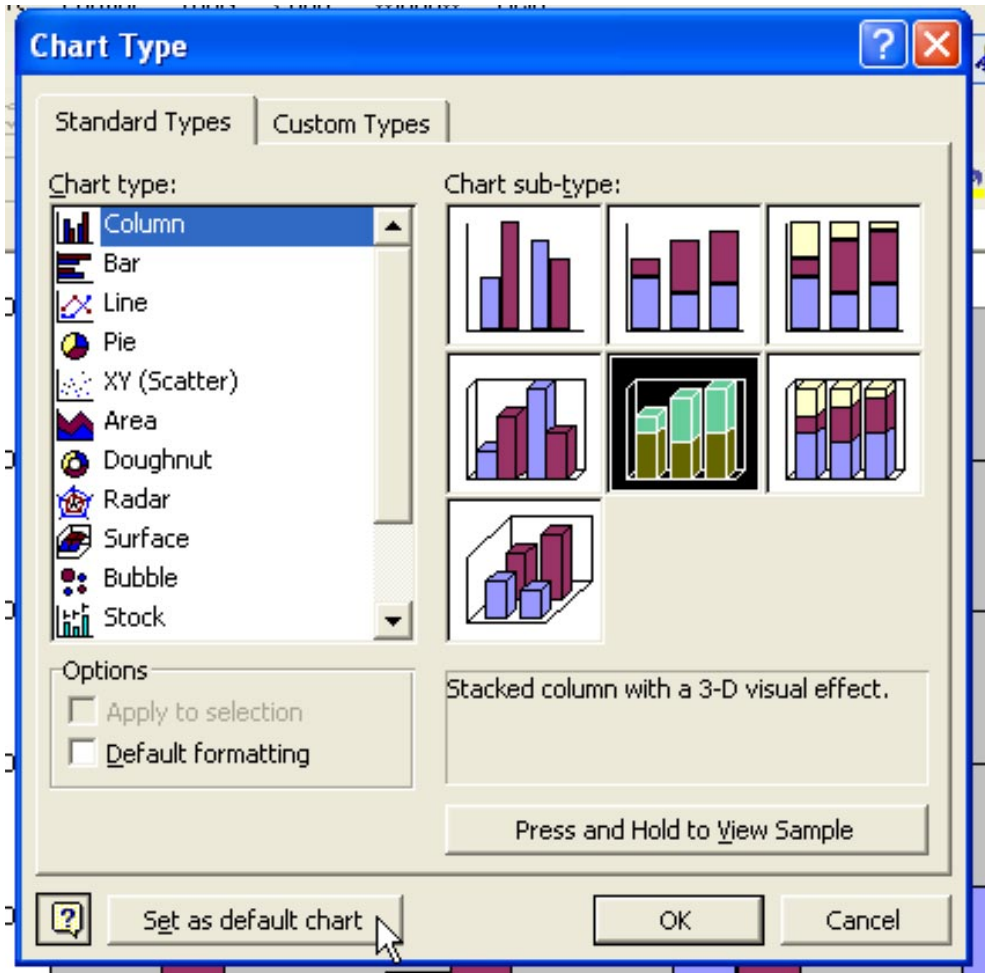

Fig. 1066

Summary: Create charts in a single click with the F11 key.

Commands Discussed: Chart – Chart Type – Set as Default Chart

CHANGE A CHART FROM A CHART SHEET TO AN EMBEDDED CHART

Problem: You created a chart with the F11 key. You need this chart to be an embedded chart. How can you change the location of the chart?

Strategy:

1) Right-click the chart. Choose Location, as shown in Fig. 1067.

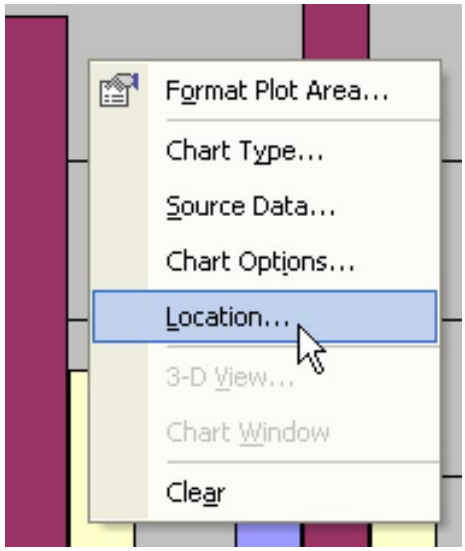

Fig. 1067

2) As shown in Fig. 1068, in the Chart Location dialog, choose a new location.

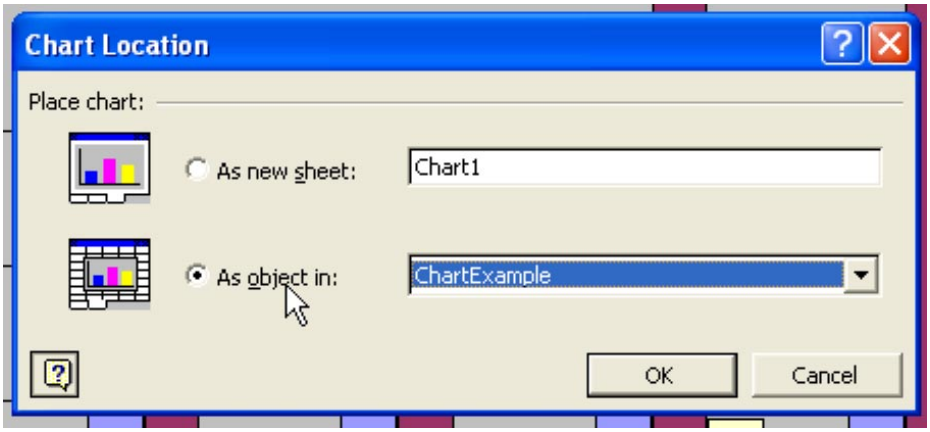

Fig. 1068

Gotcha: When you move a chart from a chart sheet to an embedded object, the size and scale of the chart changes, as shown in Fig. 1069. It is best to move the chart to its final location before customizing it.

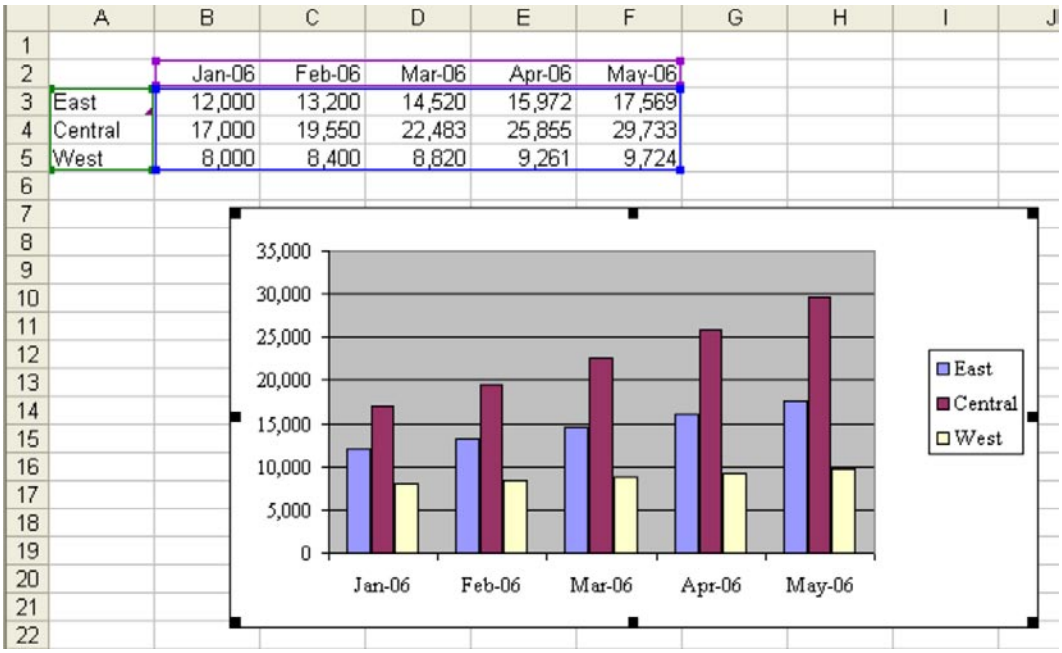

Fig. 1069

Summary: You can move an embedded chart to its own chart sheet or back to an embedded chart by right-clicking and choosing the Location option.

Commands Discussed: Chart – Chart Location

CUSTOMIZE ANYTHING ON A CHART WITH RIGHT-CLICK

Problem: The standard Excel chart is ugly. They gray background on the plot area is annoying and wastes toner in the copier and printer.

Strategy: Everything on a chart can be customized. Right-click the item and choose customize. To get rid of the gray plot area, right-click on the

middle of nothing in the chart and choose Format Plot Area, as shown in Fig. 1070.

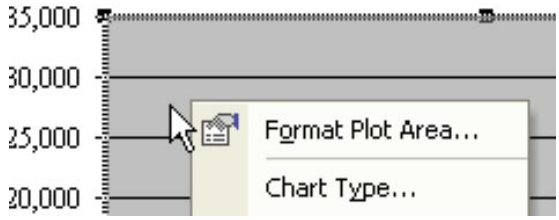

Fig. 1070

In the Format dialog, choose the white color to eliminate the gray background, as shown in Fig. 1071.

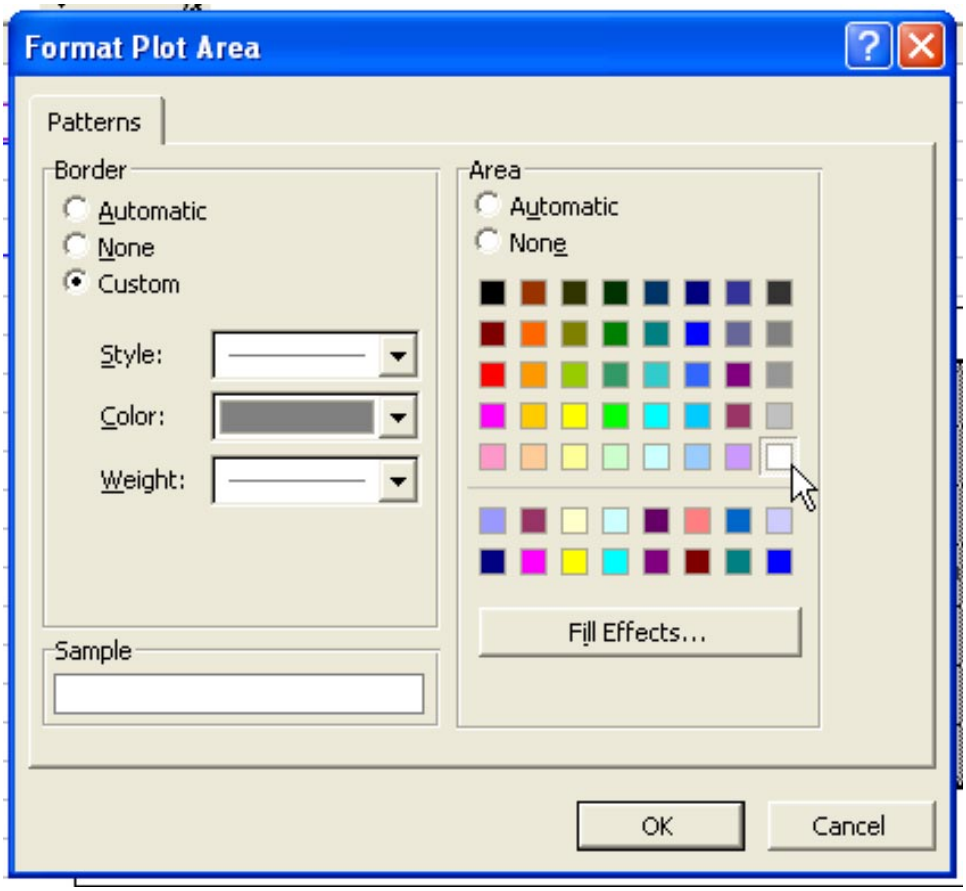

Fig. 1071

Result: As shown in Fig. 1072, the gray background is gone.

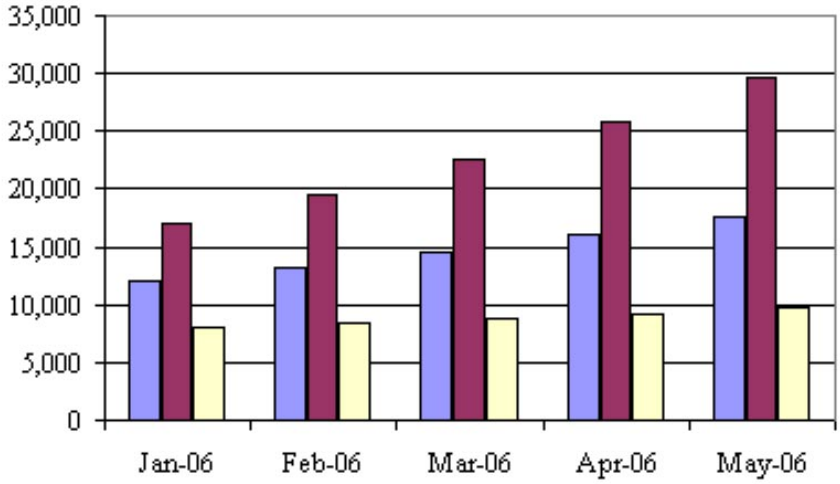

Fig. 1072

Additional Details: Just about everything on the chart can be customized using this method. Additional examples follow.

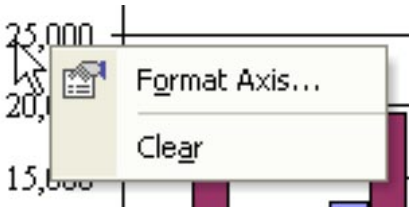

Fig. 1073

To change the numeric format on the y-axis:

1) Right-click and choose Format Axis, as shown in Fig. 1073.

2) In the Format Axis dialog, choose the Number tab. Choose the Custom category and use a custom number format of $#,##0,K to eliminate the extra zeroes in the display of numbers along the axis, as shown in Fig. 1074.

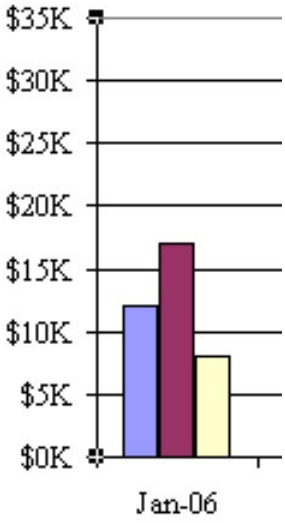

Fig. 1074

3) You can drag the legend from its location along the side and drop it in a blank area of the chart, as shown in Fig. 1075.

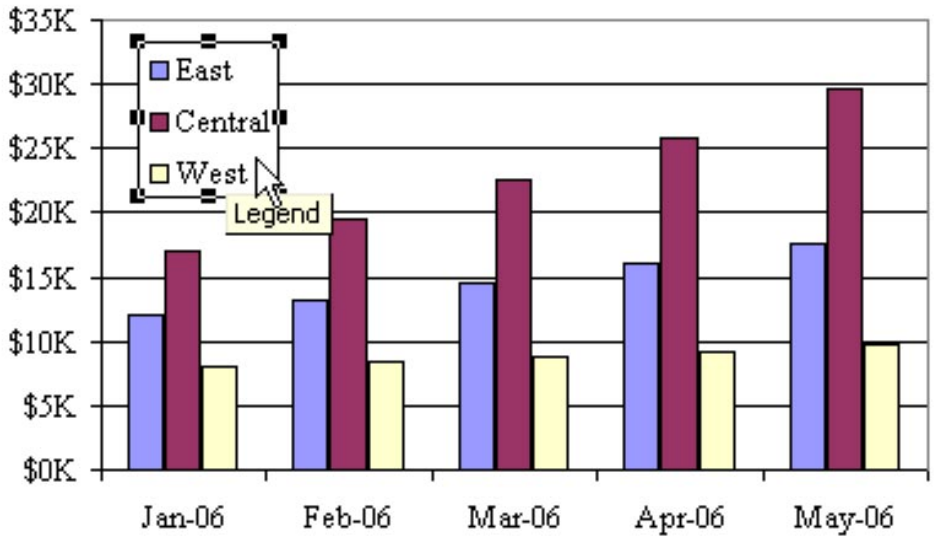

Fig. 1075

4) You can then drag the right edge of the chart to the right, to fill the area that used to be taken up by the legend, as shown in Fig. 1076.

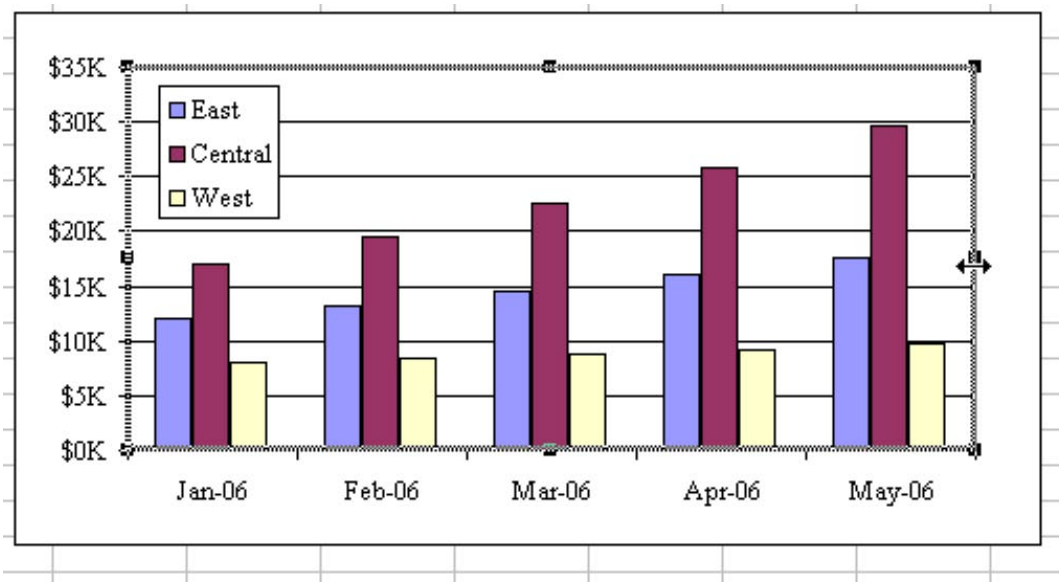

Fig. 1076

To change the background on the plot area:

1) Instead of a boring white plot area, you can use an interesting gradient. Right-click on nothing in the middle of the chart and choose Format Plot Area…, as shown in Fig. 1077.

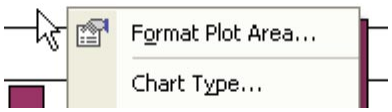

Fig. 1077

2) Choose the Fill Effects… button, as shown in Fig. 1078.

Fig. 1078

3) In the Fill Effects dialog, choose the Gradient tab. Choose Two Colors. I like a gradient from green to white for revenue charts, as shown in Fig. 1079.

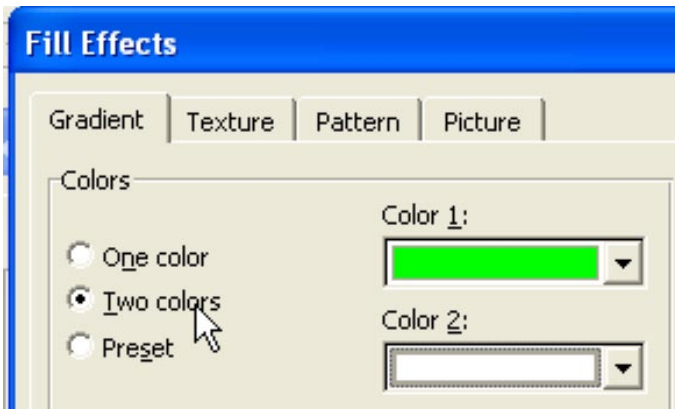

Fig. 1079

To change the look of the data series:

1) Single-click any bar to select the entire data series. Right-click and choose Format Data Series, as shown in Fig. 1080.

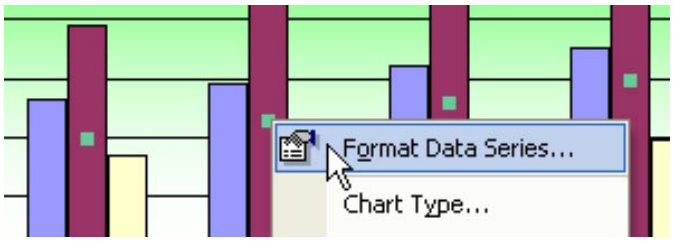

Fig. 1080

2) You can now change the color for that series of bars. Or, you can add a data label to the bar, as shown in Fig. 1081.

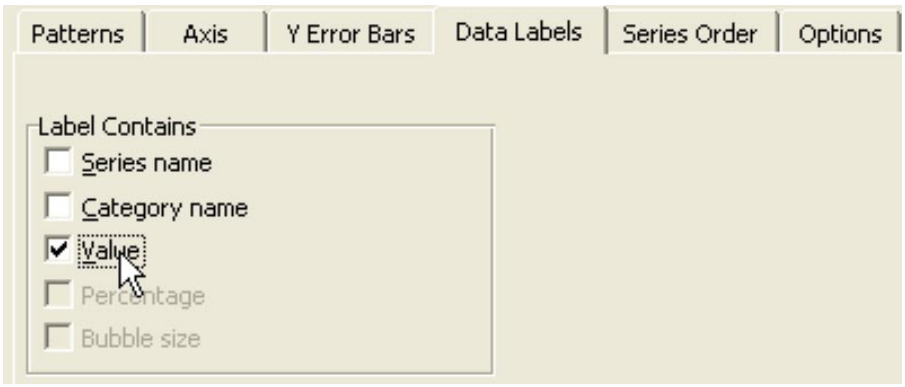

Fig. 1081

To change the look of a data point and its label:

1) What if there is one single bar that needs explaining? Single-click the bar to select the whole series. Then, do a second single-click to select just the data point. You can right-click and select Format Data Point..., as shown in Fig. 1082.

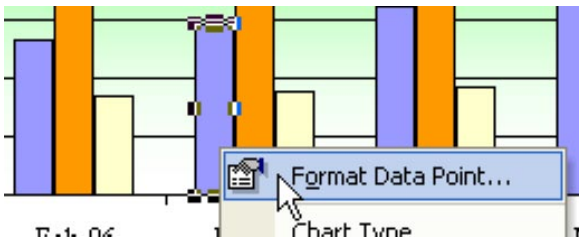

Fig. 1082

2) If the data labels run into the axis, you can easily move them. The first click on a data label will select all of the data labels for that series, as shown in Fig. 1083.

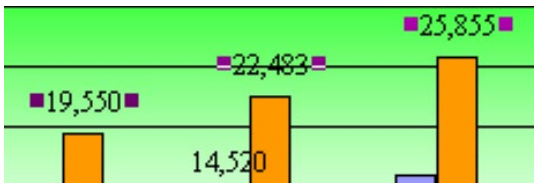

Fig. 1083

3) A second single-click on the one data label will select just that label, as shown in Fig. 1084.

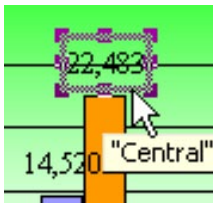

Fig. 1084

4) You can now grab the bounding box and nudge the label up or down, so it does not appear on the gridline, as shown in Fig. 1085.

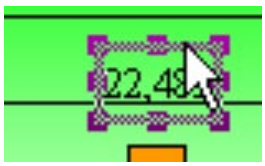

Fig. 1085

To control gridline formatting:

1) As you might expect, you can change the gridlines by right-clicking on a gridline and choosing format gridlines, as shown in Fig. 1086.

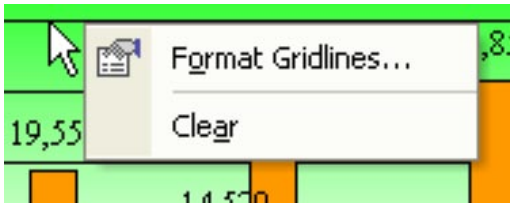

Fig. 1086

2) Change the gridlines to be dotted lines instead of solid, as shown in Fig. 1087.

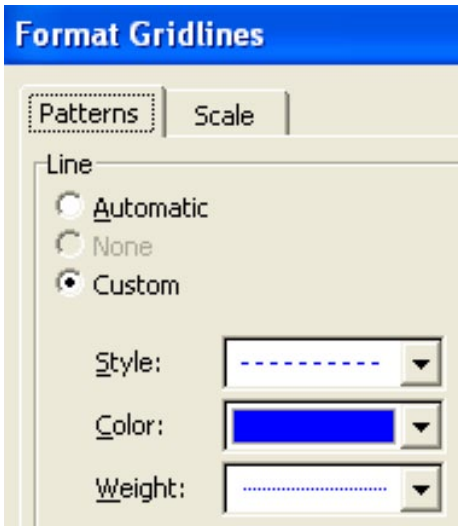

Fig. 1087

As shown in Fig. 1088, the resulting chart may be even more hideous than the default Excel chart, but at least you can take pride that it is hideousness that you created, instead of being forced to accept the Excel default.

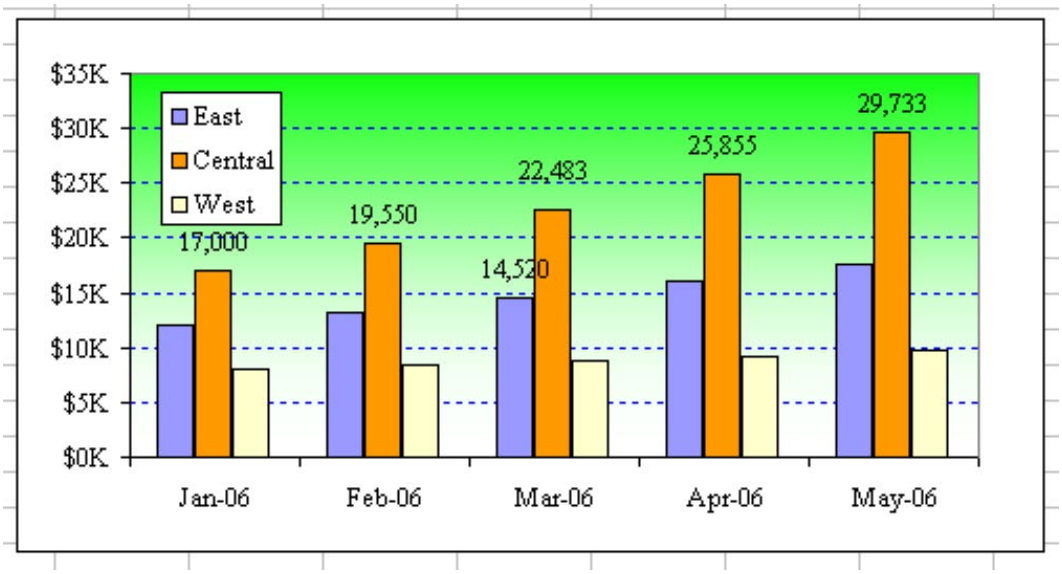

Fig. 1088

Summary: You have ultimate control of nearly everything on a chart. Few of these choices can be changed through the Chart menu. You have to right-click around the chart.

Commands Discussed: Chart – Customize

HOW TO MINIMIZE OVERLAP OF PIE CHART LABELS

Problem: On a three-dimensional pie chart with several small pie slices, the labels for the smaller pie slices will often overwrite each other, as shown in Fig. 1089. Improve the look of the chart.

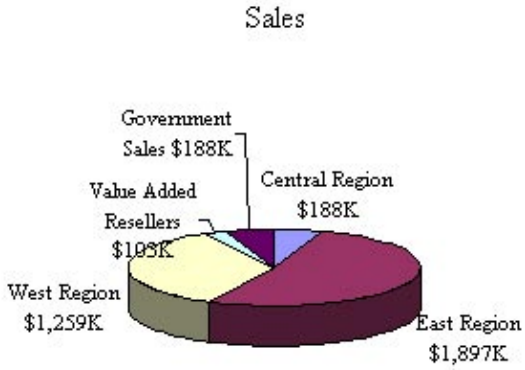

Fig. 1089

Strategy: You can rotate the pie chart so that smaller slices are near the front corner. Follow these steps.

1) Right-click the pie chart. From the right-click menu, select Format Data Series.

2) There are three tabs on the Format Data Series dialog. Choose the rightmost tab – Options.

3) Use the Angle of First Slice spin button to rotate the pie in 10-degree increments, as shown in Fig. 1090. Look in the preview window to find spots where all of the labels fit without overlapping.

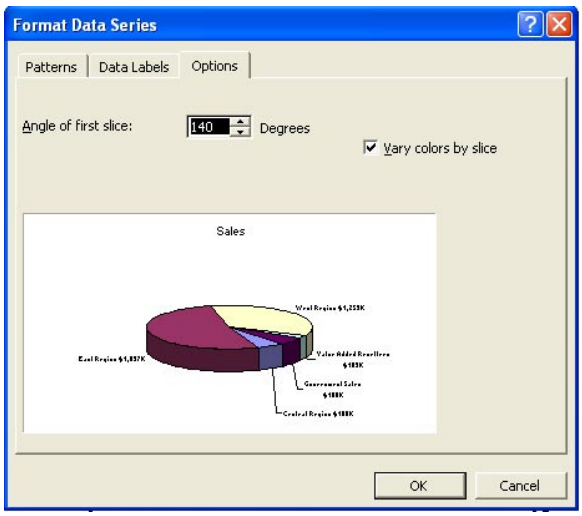

Fig. 1090

4) Choose OK to close the Format Data Series dialog.

Result: All of the data labels are visible, as shown in Fig. 1091.

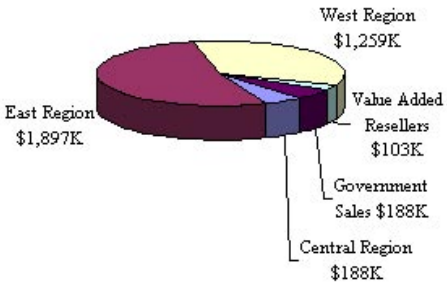

Fig. 1091

Alternate Strategy: Using the mouse, click on one of the data labels. Black Fill handles will surround all of the labels. Right-click any label and choose Format Data Labels, as shown in Fig. 1092. You can now change the font of all labels.

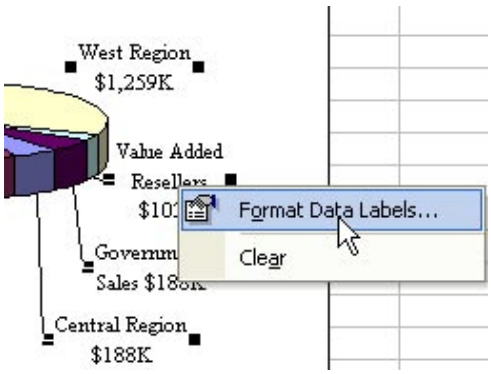

Fig. 1092

Alternate Strategy: Single-click on a data label to select all data labels. Wait long enough to not qualify as double-click, and do a second single-click on just one data label. Now, only one label is selected, as shown in Fig. 1093. You can now use the mouse to drag the label to a new position.

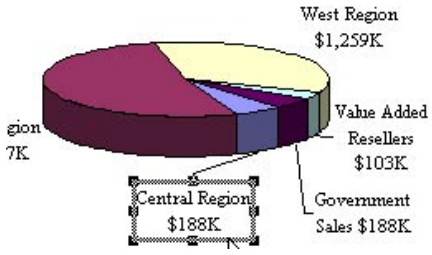

Fig. 1093

Summary: The Angle of First Slice setting on the Format Data Series dialog allows you to find the best angle, where the fewest labels overlap. You can then use the Format Data Labels to change the font or simply move one data label out of the way.

Commands Discussed: Format Data Series; Format Data Labels

ADD NEW DATA TO A CHART

Problem: You need to create twelve charts every month. Using a previous tip, you have now created beautiful, highly customized charts. It is a real pain to re-create these charts every month.

Strategy: If your chart is located as an embedded object on a sheet, you can drag and drop new data on the chart.

1) Type the new data for your chart adjacent to the old data, as shown in Fig. 1094.

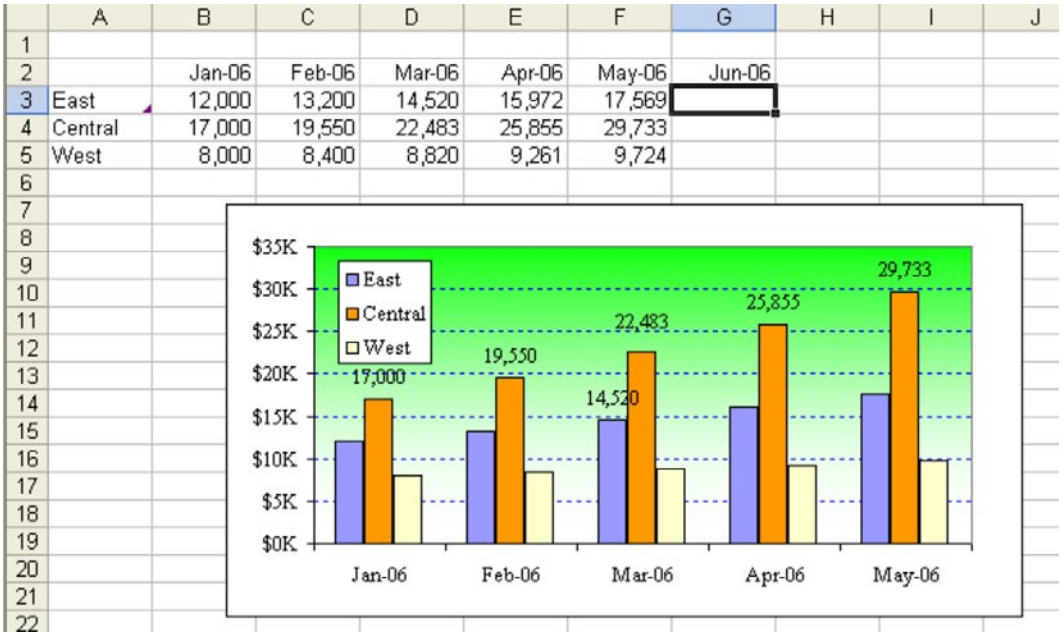

Fig. 1094

2) Select the entire range, including the new heading for the new month, as shown in Fig. 1095.

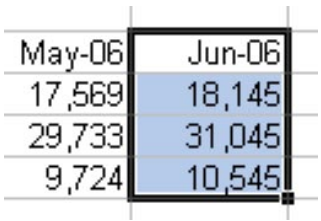

Fig. 1095

3) Using the mouse, grab anywhere on the thick black border (but do not grab the square Fill handle in the lower right). Start to drag the border down towards the chart, as shown in Fig. 1096.

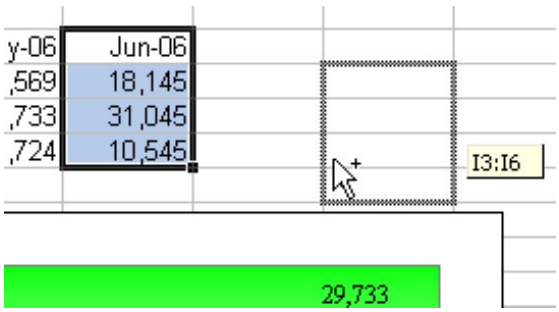

Fig. 1096

4) When the cell pointer is over the chart, the cursor changes to just an arrow with a plus sign. Release the mouse button. Miraculously, the chart is updated with your new data, as shown in Fig. 1097.

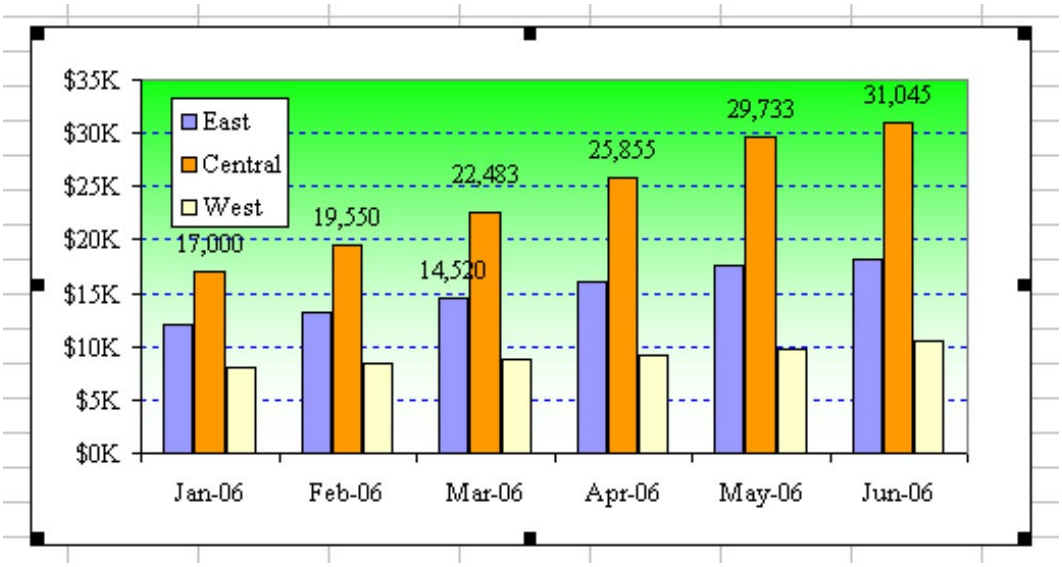

Fig. 1097

Summary: You'll never have to waste hours creating new charts each month. Simply copy the new data adjacent to the old data and drag and drop it on the chart. I first saw this trick in a demo at a Microsoft seminar. The "wow" factor was amazing.