

Excel[®] 2007 Charts

John Walkenbach



Wiley Publishing, Inc.

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John Walkenbach is a leading authority on spreadsheet software and principal of J-Walk and Associates Inc., a small Tucson-based consulting firm that specializes in spreadsheet application development. John is the author of about 50 spreadsheet books and has written more than 300 articles and reviews for a variety of publications, including *PC World*, *InfoWorld*, *PC Magazine*, *Windows*, and *PC/Computing*. He also maintains a popular Web site (The Spreadsheet Page, www.j-walk.com/ss) and is the developer of the Power Utility Pak, an award-winning add-in for Microsoft Excel. John graduated from the University of Missouri and earned a master's and Ph.D. degree from the University of Montana.

Acknowledgments

I've written many Excel books, but this one was probably the most challenging. I learned quite a bit during this project, and it furthered my belief that Excel is a never-ending source of surprises, even for us old-timers. Excel's charting feature is like an iceberg: There is much more to it than appears on the surface.

Special thanks are due to Jon Peltier, one of the planet's leading Excel chart experts and Microsoft MVP. I was able to convince Jon to be the technical editor for this book, and his contributions are sprinkled liberally throughout the pages. As in the past, it was a pleasure working with Paul Levesque, my project editor. I'm also grateful to Greg Croy, acquisitions editor at Wiley, for giving me the go-ahead to write this book.

The Excel community tends to be very open with its ideas, and this is especially apparent in the area of charting. I owe a special debt to many people who provided the inspiration for several of the examples in this book. Thanks to Stephen Bullen, Debra Dalgleish, Charley Kyd, Tushar Mehta, and Andy Pope, all of whom are Microsoft Excel MVPs and charting pros. I'm also grateful to Debbie Gewand, who amazed me with her Excel clip art. Thanks also to Nick Hodge, an Excel MVP who really likes to see his name in my books.

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Contents at a Glance

Introduction	1
Part I: Chart Basics	7
<hr/>	
Chapter 1: Introducing Excel Charts	9
Chapter 2: Understanding Chart Types	33
Chapter 3: Working with Chart Series	69
Chapter 4: Formatting and Customizing Charts	99
Chapter 5: Working with Trendlines and Error Bars	155
Chapter 6: Working with Shapes and Other Graphics	193
Part II: Mastering Charts	229
<hr/>	
Chapter 7: Creating Interactive Charts	231
Chapter 8: Charting Techniques and Tricks	261
Chapter 9: In-Cell Charting Techniques	303
Chapter 10: Mathematical and Statistical Charting Techniques	329
Chapter 11: Using Pivot Charts	353
Chapter 12: Avoiding Common Chart-Making Mistakes	389
Chapter 13: Just for Fun	415
Part III: Mastering Charts	435
<hr/>	
Chapter 14: VBA Overview and Basic Examples	437
Chapter 15: Advanced VBA Examples	461
Chapter 16: Working with Colors	487
Part IV: Appendixes	511
<hr/>	
Appendix A: What's on the CD-ROM?	513
Appendix B: Other Charting Resources	525
Index	533
End-User License Agreement	557

Contents

Introduction	1
Part I: Chart Basics	
<hr/>	
Chapter 1: Introducing Excel Charts	9
What Is a Chart?	9
How Excel Handles Charts	10
Embedded Charts	12
Chart Sheets	13
Parts of a Chart	16
Basic Steps for Creating a Chart	19
Creating the Chart	19
Switching the Row and Column Orientation	20
Changing the Chart Type	21
Applying a Chart Layout	22
Applying a Chart Style	22
Adding and Deleting Chart Elements	23
Formatting Chart Elements	24
Working with Charts	26
Moving and Resizing a Chart	26
Converting an Embedded Chart to a Chart Sheet	27
Copying a Chart	27
Deleting a Chart	28
Adding Chart Elements	28
Moving and Deleting Chart Elements	28
Formatting Chart Elements	28
Copying a Chart's Formatting	30
Renaming a Chart	30
Printing Charts	30
Chapter 2: Understanding Chart Types	33
Conveying a Message with a Chart	33
Choosing a Chart Type	34
Excel's Chart Types	36
Column Charts	37
Bar Charts	43
Line Charts	44
Pie Charts	48
Scatter Charts	50
Area Charts	53
Doughnut Charts	54
Radar Charts	56
Surface Charts	58

Bubble Charts	60
Stock Charts	62
Creating Combination Charts	64
Creating and Using Chart Templates	67
Chapter 3: Working with Chart Series	69
Specifying the Data for Your Chart	70
Adding a New Series to a Chart	72
Adding a New Series by Copying a Range	72
Adding a New Series by Extending the Range Highlight	74
Adding a New Series Using the Select Source Data Dialog Box	74
Adding a New Series by Typing a New SERIES Formula	75
Deleting a Chart Series	76
Modifying the Data Range for a Chart Series	76
Using Range Highlighting to Change Series Data	77
Using the Select Data Source Dialog Box to Change Series Data	78
Editing the SERIES Formula to Change Series Data	80
Understanding Series Names	82
Changing a Series Name	83
Deleting a Series Name	84
Adjusting the Series Plot Order	84
Charting a Noncontiguous Range	87
Using Series on Different Sheets	88
Handling Missing Data	89
Controlling a Data Series by Hiding Data	91
Unlinking a Chart Series from Its Data Range	93
Converting a Chart to a Picture	93
Converting Range Reference to Arrays	94
Working with Multiple Axes	96
Chapter 4: Formatting and Customizing Charts	99
Chart Formatting Overview	100
Selecting Chart Elements	100
Common Chart Elements	103
User Interface Choices for Formatting	105
Adjusting Fills and Borders: General Procedures	108
About the Fill Tab	108
Formatting Borders	110
Formatting Chart Background Elements	113
Working with the Chart Area	113
Working with the Plot Area	113
Formatting Chart Series	116
Basic Series Formatting	117
Using Pictures and Graphics for Series Formatting	117
Additional Series Options	118
Working with Chart Titles	121
Adding Titles to a Chart	122
Changing Title Text	122

Formatting Title Text	122
Linking Title Text to a Cell	123
Working with a Chart's Legend	125
Adding or Removing a Legend	126
Moving or Resizing a Legend	126
Formatting a Legend	127
Changing the Legend Text	127
Deleting a Legend Entry	127
Working with Chart Axes	127
Value Axis versus Category Axis	128
Value Axis Scales	129
Using Time-Scale Axes	137
Creating a Multiline Category Axis	139
Adding and Removing Axes	140
Axis Number Formats	140
Working with Gridlines	142
Adding or Removing Gridlines	142
Working with Data Labels	143
Adding or Removing Data Labels	143
Editing Data Labels	144
Problems and Limitations with Data Labels	147
Working with a Chart Data Table	149
Adding and Removing a Data Table	150
Problems and Limitations with Data Tables	150
Formatting 3-D Charts	151
Rotating 3-D Charts	152
Formatting a Surface Chart	153
Chapter 5: Working with Trendlines and Error Bars	155
Working with Trendlines	155
Chart Types That Support Trendlines	156
Data Appropriate for a Trendline	157
Adding a Trendline	158
Formatting a Trendline	161
Formatting a Trendline Label	161
Linear Trendlines	162
Linear Forecasting	164
Getting the Trendline Values	166
Nonlinear Trendlines	167
Logarithmic Trendline	168
Power Trendline	169
Exponential Trendline	170
Polynomial Trendline	172
Displaying a Moving Average	175
Adding a Moving Average Line	175
Creating Your Own Moving Average Data Series	176

Using Error Bars in a Chart Series	177
Chart Types That Support Error Bars	177
Adding Error Bars to a Series	178
Using Custom Error Bars	181
Connecting Series Points to a Trendline with Error Bars	184
Error Bar Alternatives	185
Other Series Enhancements	186
Series Lines	187
Drop Lines	188
High-Low Lines	189
Up/Down Bars	190
Chapter 6: Working with Shapes and Other Graphics	193
Using Shapes	193
Inserting Shapes	195
Adding Text to a Shape	197
Formatting Shapes	198
Selecting Multiple Objects	200
Grouping Objects	200
Moving Shapes	200
Copying Objects	201
Changing the Stack Order of Objects	201
Aligning and Spacing Objects	201
Changing a Shape to a Different Shape	202
Reshaping Shapes	202
Changing the Shape Defaults	204
Printing Objects	204
Working with SmartArt	204
Inserting SmartArt	204
Customizing SmartArt	205
Changing the Layout	207
Changing the Style	207
Finding Out More about SmartArt	207
Using WordArt	209
Working with Other Graphic Types	210
About Graphics Files	210
Using the Clip Art Task Pane	210
Inserting Graphics Files	212
Copying Graphics by Using the Clipboard	213
Displaying a Worksheet Background Image	214
A Gallery of Graphic Examples	214
Using Shapes and Pictures with Charts	214
Calling Attention to a Cell	223
Changing the Look of Cell Comments	224
Pasting Pictures of Cells	226

Part II: Mastering Charts

Chapter 7: Creating Interactive Charts	231
Introducing Interactive Charts	232
Hands-On: Creating a Self-Expanding Chart	232
Creating the Chart	234
Creating Named Formulas	234
Modifying the Series	235
Testing the Self-Expanding Chart	237
Understanding How the Self-Expanding Chart Works	237
Controlling a Series with a Scroll Bar	239
Creating the Chart	240
Defining the Names	240
Adding the Scroll Bar Control	241
Specifying the Beginning and End Point for a Series	243
Creating the Chart	243
Defining the Names	244
Adding Spinner Controls	244
Specifying the First Point and Number of Points for a Series	245
Creating the Chart	245
Defining the Names	246
Adding the User Interface Elements	246
Plotting the Last n Data Points in a Series	248
Creating the Chart	248
Defining the Names	249
Plotting Every nth Data Point in a Series	249
Using Filtering	249
Using Array Formulas	251
Creating Named Formulas	252
Using Check Boxes to Select Series to Plot	253
Creating the Chart	254
Adding the Check Box Controls	254
Defining the Names	254
Modifying the Chart Series	255
Creating a Very Interactive Chart	255
Getting the Data	257
Creating the Option Button Controls	257
Creating the City Lists	257
Creating the Chart's Data Range	258
Creating the Chart	259
Chapter 8: Charting Techniques and Tricks	261
Adding Lines and Backgrounds to a Chart	262
Adding Horizontal Reference Lines to a Chart	262
Adding a Vertical Line to a Chart with an XY Series	263
Using Background Columns to Represent a Vertical Line	264
Adding Vertical or Horizontal "Bands"	266
Creating a Scatter Chart with Colored Quadrants	268

Charts That Use a Single Data Point	270
Creating a Thermometer Chart	270
Creating a Gauge Chart	272
Using a Dummy Axis	274
An Introductory Example	274
Labeling an Axis with Nonequal Intervals	277
Column and Bar Chart Variations	278
Stacked Column Chart Variations	278
Creating a Step Chart	281
Varying Column Widths	283
Conditional Column Colors	284
Creating a Comparative Histogram	286
Creating Gantt Charts	288
Identifying the Maximum and Minimum Values in a Series	289
Shading between Two Series in a Line Chart	291
Creating a Timeline	292
Creating “Impossible” Charts by Stacking and Overlaying	293
Stacking Charts	293
Overlaying Charts	295
Simulating a “Broken” Value Axis	298
Displaying Multiple Charts on a Chart Sheet	300
Chapter 9: In-Cell Charting Techniques	303
Visualizing Data with Conditional Formatting	303
Data Bars	304
Color Scales	309
Icon Sets	312
Plotting Data without a Chart	317
Creating Sparkline Charts	320
Sparkline Charts from Text	321
Sparkline Charts from a Chart	322
Commercial Sparkline Add-Ins	328
Chapter 10: Mathematical and Statistical Charting Techniques	329
Drawing a Circle with an XY Series	330
Connecting Scatter Chart Data Points to the Axes with Error Bars	332
Connecting XY Points to the Origin	332
Creating Frequency Distributions and Histograms	333
Using the FREQUENCY Function	334
Using the Analysis ToolPak to Create a Frequency Distribution	336
Using Adjustable Bins to Create a Histogram	337
Plotting a Normal Curve	339
Plotting Z-Scores with Standard Deviation Bands	341
Calculating the Area under a Curve	342
Creating a Box Plot	344
Plotting Mathematical Functions	346
Plotting Functions with One Variable	346
Plotting Functions with Two Variables	349
Creating a 3-D Scatter Plot	351

Chapter 11: Using Pivot Charts	353
What Is a Pivot Table?	353
A Pivot Table Example	354
Data Appropriate for a Pivot Table	356
Creating a Pivot Table	358
Specifying the Data	359
Specifying the Location for the Pivot Table	359
Laying Out the Pivot Table	360
Formatting the Pivot Table	361
Modifying the Pivot Table	364
Working with Pivot Charts	366
Creating a Pivot Chart	366
A Pivot Chart Example	367
Pivot Chart Banking Examples	371
Question 1	371
Question 2	372
Question 3	373
Question 4	375
Question 5	377
Question 6	378
More Pivot Chart Examples	379
Creating a Quick Frequency Distribution Chart	379
Selecting Rows to Plot	381
Using Data from Multiple Sheets	384
Chapter 12: Avoiding Common Chart-Making Mistakes	389
Know Your Audience	389
Chart Accuracy	390
Plotting Data Out of Context	392
Exaggerating Differences or Similarities	392
Plotting Percent Change versus Actual Change	394
Grouping with Unequal Bin Sizes	394
Problems with Chart Type Selection	396
Category versus Value Axis	396
Problems with Pie Charts	397
Consider Alternative Chart Types	401
Problems with Negative Values	401
Scatter Charts with the Smoothed Line Option	403
Don't Be Tempted by 3-D Charts	403
Chart Complexity	405
Just Plain Bad	406
Maximizing "Data Ink"	406
Chart Style	409
Text and Font Mistakes	409
A Chart Maker's Checklist	412

Chapter 13: Just for Fun	415
Animating Stuff	415
Animated Shapes	416
Animated Charts	416
Doughnut Chart Wheel of Fortune	418
Fun with Trigonometry	419
A Simple Sine-versus-Cosine Plot	419
Hypocycloid Charts	420
Radar Chart Designs	422
Chart Art	423
A Mountain Range Chart	423
A Bubble Chart Mouse Head	424
A Smile Chart	424
Scatter Chart Drawings	426
An Analog Clock Chart	428
Roll the Dice	429
Horse Race Chart	430
Using Clip Art	431

Part III: Mastering Charts

Chapter 14: VBA Overview and Basic Examples	437
VBA in a Nutshell	437
The Macro Recorder and Charts	440
The Chart Object Model	442
Using Object Variables	444
Using the With-End With construct	445
Finding Out More about the Chart Object Model	445
Simple Chart Macros	448
Activating and Deactivating a Chart	448
Determining whether a Chart Is Activated	450
Determining whether the Active Chart Is Embedded	451
Deleting from the ChartObjects or Charts Collection	452
Counting and Looping through Charts	453
Counting Chart Sheets	453
Counting Embedded Charts	453
Looping through All Charts	453
Changing the Location of All Charts	455
Printing All Embedded Charts	455
Setting Axis Values	456
Sizing and Aligning Charts	458
Chapter 15: Advanced VBA Examples	461
Creating Charts with VBA	462
Creating an Embedded Chart	462
Creating a Chart on a Chart Sheet	464

Using VBA to Apply Chart Formatting	464
Formatting a Chart	465
More Chart Formatting Examples	467
Applying Data Labels	469
A Basic Data Label Macro	469
Applying Linked Data Labels	470
Prompting for a Range	471
Exporting Charts as GIF Files	473
Creating a Scrolling Chart	474
Creating a Word Cloud	476
Determining the Ranges Used by a Chart	477
Event Procedure Examples	479
Worksheet_Change Event Procedures	479
Selection_Change Event Procedures	483
Chapter 16: Working with Colors	487
About Excel 2007 Colors	487
Specifying Colors	488
The RGB Color System	488
The HSL Color System	489
Converting Colors	490
Understanding Grayscale	492
Converting Colors to Gray	492
Viewing Charts as Grayscale	493
Experimenting with Colors	494
Understanding Document Themes	495
About Document Themes	495
Understanding Document Theme Colors	496
Displaying All Theme Colors	500
Working with Shape Objects	503
A Shape's Background Color	503
Using Other Fill Types with a Shape	505
Finding Out More about Shapes	507
Modifying Chart Colors	507
Part IV: Appendixes	
<hr/>	
Appendix A: What's on the CD-ROM?	513
Appendix B: Other Charting Resources	525
Index	533
End-User License Agreement	557

Introduction

Welcome to *Excel 2007 Charts*. This book is intended for spreadsheet users who want to get the most out of Excel's charting and graphics features. I approached this project with one goal in mind: to write the ultimate Excel charting book that would appeal to users of all levels.

As you probably know, most bookstores offer dozens of Excel books. The vast majority of these books are general-purpose user guides that explain how to use the features available in Excel (often by simply rewording the text in the help files). Most of these books include a chapter or two that cover charts and graphics. None, however, provides the level of detail that you'll find in this book.

I've used Excel for almost 15 years, and I've been creating charts for more than 30 years. Back in the precomputer days, I often spent hours creating a publication-quality chart by hand, using rulers, graph paper, and rub-off lettering. Today, creating such a chart with Excel would require only a few minutes — and would probably look much better.

Many Excel users tend to overlook the powerful charting features available. For many, creating anything but the simplest chart often seems like a daunting task. This book starts with the basics and covers every aspect of charting, including macros. If I've done my job, working through this book will give you some new insights and perhaps a greater appreciation for Excel.

What You Should Know

This is *not* a book for beginning Excel users. If you have absolutely no experience with Excel, this may not be the best book for you. To get the most out of this book, you should have some background using Excel. Specifically, I assume that you know how to:

- Create workbooks, enter data, insert sheets, save files, and perform other basic tasks.
- Navigate through a workbook.
- Use the new Excel 2007 Ribbon interface.
- Work with dialog boxes.
- Create basic formulas.
- Use common Windows features, such as file-management and copy-and-paste techniques.

Later chapters cover VBA programming, and the main focus there is on creating and controlling charts using VBA. These chapters assume a basic knowledge of VBA, and those who have some experience with VBA will benefit most from these programming chapters. They'll be able to customize the examples and make them even more powerful. These chapters may inspire nonprogrammers to spend some time understanding VBA.



NOTE

Most of the material in this book is also relevant to those who need to create charts in Microsoft Word 2007 or Microsoft PowerPoint 2007. Choose Insert ⇨ Chart from the Ribbon, and you'll have yourself the beginnings of a chart. The chart uses dummy data in an Excel workbook that's opened for you automatically. Replace the dummy data with real data, and then format the chart to your liking. The Chart Tools context menu in Word and PowerPoint is identical to the one in Excel.

What You Should Have

To use this book, you need to have a copy of Microsoft Excel 2007 for Windows. No exceptions. Excel 2007 is so different from previous versions that this book doesn't even make an attempt at backward compatibility. If you use a previous version of Excel, locate a copy of the initial edition of this book (*Excel Charts*, published in 2003 by Wiley).

To use the examples on the companion CD-ROM, you'll need a CD-ROM drive. The examples on the CD-ROM are discussed further in Appendix A, "What's on the CD-ROM?"

Hardware requirements? The faster the better. And, of course, the more memory in your system, the happier you'll be. I strongly recommend using a high-resolution video mode: at least 1024 x 768 and preferably higher. When working with charts, it's very convenient to be able to see lots of information without scrolling. My normal setup is a dual-monitor system, with two 1600 x 1200 displays.

Conventions Used in This Book

Take a minute to skim the following sections and discover some of the typographic conventions used throughout this book.

Ribbon Commands

Excel 2007 features a brand new “menuless” user interface. In place of a menu system, Excel uses a context-sensitive Ribbon system. The words along the top (such as Home, Insert, Page Layout, and so on) are known as *tabs*. Click a tab, and the Ribbon displays the commands for the selected tab. Each command has a name that is (usually) displayed next to or below the icon. The commands are arranged in groups, and the group name appears at the bottom of the Ribbon.

The convention I use is to indicate the tab name, followed by the group name, followed by the command name. So, the command used to toggle word wrap within a cell is indicated as follows:

```
Home→Alignment→Wrap Text
```

When a chart is selected, Excel displays additional “contextual” tabs. So, for example, to add a title to the selected chart, I indicate the command as follows:

```
Chart Tools→Layout→Labels→Chart Title→Above Chart
```

Formula Listings

Formulas usually appear on a separate line in monospace font. For example, I may list the following formula:

```
=VLOOKUP(StockNumber,PriceList,2,False)
```

VBA Code Listings

This book also contains examples of VBA code. Each listing appears in a monospace font; each line of code occupies a separate line. To make the code easier to read, I typically use one or more spaces to create indentations. Indentation is optional, but it does help to delineate statements that go together.

If a line of code doesn't fit on a single line in this book, I use the standard VBA line continuation sequence: a space followed by an underscore character. This indicates that the line of code extends to the next line. For example, the following two lines comprise a single VBA statement:

```
If ActiveChart Is Nothing Then _  
    MsgBox "Please select a chart or activate a chart sheet."
```

You can enter this code either exactly as shown on two lines, or on a single line without the trailing underscore character.

Key Names

Names of keys on the keyboard appear in normal type — for example, Alt, Home, PgDn, and Ctrl. When you should press two keys simultaneously, the keys are connected by a plus sign: “Press Ctrl+G to display the Go To dialog box.”

Functions, Procedures, and Named Ranges

Excel’s worksheet functions appear in all uppercase characters, like so: “Use the SUM function to add the values in column A.”

Unless you’re dealing with text inside quotation marks, Excel is not sensitive to case. In other words, both of the following formulas produce the same result:

```
=SUM(A1:A50)
```

```
=sum(a1:a50)
```

Excel, however, will convert the characters in the second formula to uppercase.

In Part III, the VBA chapters, terms such as names of objects, properties, and methods that appear in code listings show up in monospace type in regular paragraphs as well: “In this case, `Application.ActiveChart` is an object, and `HasTitle` is a property of the object.” Macro and procedure names appear in normal type: “Execute the `UpdateChart` procedure.” I often use mixed uppercase and lowercase letters to make these names easier to read. Named ranges appear in italic: “Select the *WeeklySales* range.”

Mouse Conventions

The mouse terminology in this book is all standard fare: pointing, clicking, right-clicking, dragging, and so on. You know the drill.

What the Icons Mean

Throughout the book, icons appear next to some text to call your attention to points that are particularly important.



NOTE

I use Note icons to tell you that something is important — perhaps a concept that may help you master the task at hand or something fundamental for understanding subsequent material.



TIP

Tip icons indicate a more efficient way of doing something, or a technique that may not be obvious. These will often impress your officemates.



ON THE CD-ROM

These icons indicate that an example file is on the companion CD-ROM. (See Appendix A for more details about the CD-ROM.)



CROSS-REFERENCE

I use the Cross-Reference icon to refer you to other chapters that have more to say on a particular topic.



WARNING

I use Warning icons when the operation that I'm describing can cause problems if you're not careful.

How This Book Is Organized

I had many ways to organize this material, but I settled on a scheme that divides the book into three main parts.

Part I: Chart Basics

This part is introductory in nature and consists of Chapters 1 through 6. Chapter 1 presents an overview of Excel's charting features. Chapter 2 presents some terminology and introduces the types of charts Excel supports. In Chapter 3, I discuss various ways to work with chart data series. Chart formatting and customizations are covered in Chapter 4. Chapter 5 discusses chart analytical features, such as trendlines and error bars. The part concludes with Chapter 6, a discussion of other types of graphics supported by Excel.

Part II: Mastering Charts

Part II consists of seven chapters that cover intermediate to advanced material. Chapter 7 covers interactive charts — charts that can be modified easily by an end user. Chapter 8 contains a wide variety of common and not-so-common charts, including ways to generate quite a few “nonstandard” charts. Chapter 9 discusses several ways to display data directly in cells, including small “sparkline” charts. Chapter 10 covers mathematical and statistical charting techniques. In Chapter 11, I cover pivot charts (charts generated from a pivot table). Chapter 12 offers suggestions to help you avoid common mistakes and make your charts more visually appealing. The final chapter in this part is Chapter 13, which is devoted to nonserious charting applications, yet contains lots of useful information.

Part III: Using VBA with Charts

The three chapters in Part III deal with VBA. Chapter 14 presents an overview of VBA as well as some basic VBA charting examples, and Chapter 15 shows more advanced examples. Chapter 16 discusses Excel's color system for VBA programmers.

Appendixes

This book includes two appendixes. Appendix A describes all the files on the companion CD-ROM. Appendix B lists additional charting-related resources on the Internet.

How to Use This Book

You can use this book any way you please. If you choose to read it from cover to cover while lounging on a sunny beach in Kauai, that's fine with me. More likely, you'll want to keep it within arm's reach while you toil away in your dimly lit cubicle.

Owing to the nature of the subject matter, the chapter order is often immaterial. Most readers will probably skip around, picking up useful tidbits here and there. If you're faced with a challenging task, you may want to check the index first to see whether the book specifically addresses your problem.

About the Power Utility Pak Offer

At the back of the book, you'll find a coupon that you can redeem for a discounted copy of my award-winning Power Utility Pak — a collection of useful Excel utilities plus many new worksheet functions. I developed this package using VBA exclusively.

You can also use this coupon to purchase the complete VBA source code for a nominal fee. Studying the code is an excellent way to pick up some useful programming techniques.

You can take the product for a test drive by installing the trial version from the companion CD-ROM.

Reach Out

I'm always interested in getting feedback on my books. The best way to provide this feedback is via e-mail. Send your comments and suggestions to:

`john@j-walk.com`

Unfortunately, I'm not able to reply to specific questions. Posting your question to one of the Excel newsgroups is, by far, the best way to get such assistance. For more information about newsgroups, see Appendix B, "Other Charting Resources."

Also, when you're out surfing the Web, don't overlook my Web site ("The Spreadsheet Page"):

`http://www.j-walk.com/ss/`

Now, without further ado, it's time to turn the page and expand your charting horizons.

Part

I

Chart Basics

chapter 1

Introducing Excel Charts

chapter 2

Understanding Chart Types

chapter 3

Working with Chart Series

chapter 4

Formatting and Customizing Charts

chapter 5:

Working with Trendlines and Error Bars

chapter 6

Working with Shapes and Other Graphics

Chapter

1

Introducing Excel Charts

In This Chapter

- ◆ What is a chart?
- ◆ How Excel handles charts
- ◆ Embedded charts versus chart sheets
- ◆ The parts of a chart
- ◆ The basic steps for creating a chart
- ◆ Working with charts

When most people think of a spreadsheet product such as Excel, they think of crunching rows and columns of numbers. But, as you probably know already, Excel is no slouch when it comes to presenting data visually, in the form of a chart. This chapter presents an introductory overview of Excel's charting ability, and contains enough information for a typical user to start creating and customizing charts.

What Is a Chart?

I'll start with the basics. A *chart* is a visual representation of numeric values. Charts (also known as graphs) have been an integral part of spreadsheets since the early days of Lotus 1-2-3. Charts generated by early spreadsheet products were extremely crude by today's standards. But, over the years, quality and flexibility have improved significantly. You'll find that Excel provides you with the tools to create a wide variety of highly customizable charts.



NOTE

In the first edition of this book, I offered an apology for the relatively poor visual quality of Excel charts. I'm pleased to be able to retract that apology for the Excel 2007 edition. The charting feature in Excel 2007 has come a long way, and Excel is now capable of producing charts with much better visual appeal.

Displaying data in a well-conceived chart can make your numbers more understandable. Because a chart presents a picture, charts are particularly useful for summarizing a series of numbers and their interrelationships. Making a chart can often help you spot trends and patterns that might otherwise go unnoticed.

Figure 1-1 shows a worksheet that contains a simple column chart that depicts a company's sales volume by month. Viewing the chart makes it very apparent that sales were off in the summer months (June through August), but they increased steadily during the final four months of the year. You could, of course, arrive at this same conclusion simply by studying the numbers. But viewing the chart makes the point much more quickly.

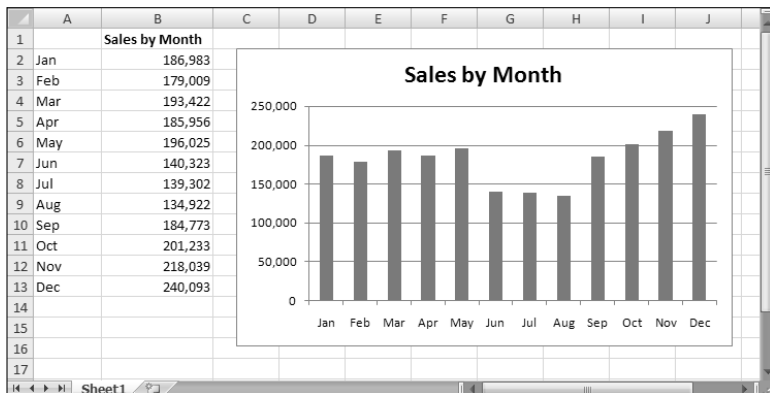


Figure 1-1: A simple column chart depicts the sales volume for each month.

A column chart is just one of many different types of charts that you can create with Excel. By the way, creating this chart was simple: I selected the data in A1:B13, and then I pressed Alt+F1.



ON THE CD

All the charts pictured in this chapter are available in a workbook on the companion CD-ROM. The file is named `introductory examples.xlsx`.

How Excel Handles Charts

Before you can create a chart, you must have some numbers — sometimes known as data. The data, of course, is stored in the cells in a worksheet. Normally, the data that is used by