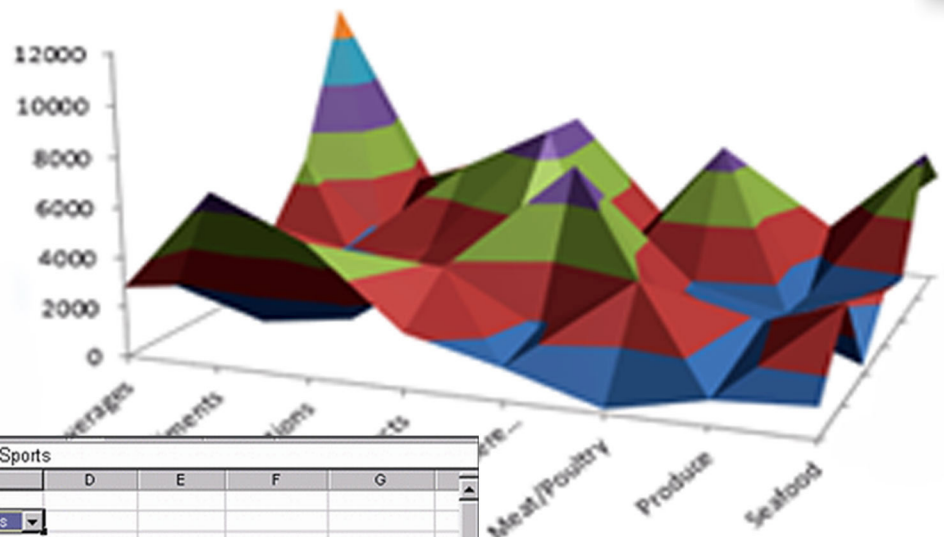


EXCEL

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2013 Tips & Tricks

PivotTables & PivotCharts



C2		Blue Sports				
A	B	C	D	E	F	G
1						
2	Company	Blue Sports				
3						
4					Data	
5	Payment method	OrderNo	Ship date	Tax rate	Items total	Amount paid
6	Cash	1083	05.10.89	0,00	11 164,80	11 164,80
7		1283	12.30.94	0,00	7 134,00	7 134,00
8	Cash Sum				18 298,80	18 298,80
9	Credit	1012	05.20.88	0,00	5 201,00	5 201,00
10		1057	02.19.89	0,00	1 975,00	1 975,00
11		1061	03.04.89	0,00	24 277,30	24 277,30
12		1091	06.01.89	0,00	1 950,00	1 950,00
13		1161	06.04.94	0,00	102 453,60	102 453,60
14		1212	11.14.94	0,00	3 975,75	3 975,75
15		1261	12.11.94	0,00	1 999,00	1 999,00
16	Credit Sum				141 831,65	141 831,65
17	MC	1168	07.04.94	0,00	104,00	104,00
18	MC Sum				104,00	104,00
19	Visa	1148	03.03.94	0,00	5 011,00	5 011,00
20	Visa Sum				5 011,00	5 011,00
21	Grand Total				165 245,45	165 245,45
22						
23						



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Tip 1: Creating PivotTables

Are you planning to create an interactive report that can quickly be used to summarize large amounts of data? Then look no further than a Pivot Table.

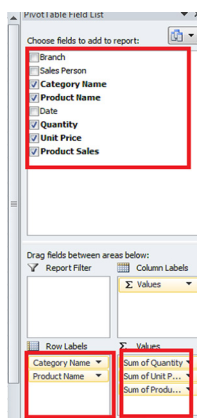
A PivotTable report is useful to summarize, analyze, explore, and present summary data. A PivotTable enables you to make informed decisions about critical data in your enterprise.

Applies To: MS Excel 2003, 2007, and 2010

1. Refer to the data as given in the example below

Branch	Sales Person	Category Name	Product Name	Date	Quantity	Unit Price	Product Sales
East Coast	Anderson. P	Confections	Maxilaku	2006/01/01	30	\$ 16.00	\$ 480.00
East Coast	Johnson. A	Grains/Cereals	Gnocchi di nonna Alice	2006/01/01	70	\$ 30.40	\$ 2 128.00
East Coast	Peters. K	Grains/Cereals	Tunnbröd	2006/01/02	60	\$ 7.20	\$ 432.00
East Coast	Bonders. P	Confections	Pavlova	2006/01/03	21	\$ 13.90	\$ 291.90
East Coast	Newson. L	Grains/Cereals	Singaporean Hokkien Fried Mee	2006/01/03	40	\$ 11.20	\$ 448.00
East Coast	Lavin. T	Seafood	Boston Crab Meat	2006/01/07	2	\$ 14.70	\$ 29.40
East Coast	Perks. M	Seafood	Inlagd Sill	2006/01/07	5	\$ 15.20	\$ 76.00
East Coast	Anderson. P	Beverages	Chai	2006/01/07	10	\$ 14.40	\$ 144.00
East Coast	Johnson. A	Dairy Products	Gudbrandsdalsost	2006/01/07	15	\$ 28.80	\$ 432.00
East Coast	Peters. K	Dairy Products	Queso Cabrales	2006/01/07	30	\$ 16.80	\$ 504.00
East Coast	Bonders. P	Beverages	Chai	2006/01/14	24	\$ 14.40	\$ 345.60
East Coast	Newson. L	Confections	Teatime Chocolate Biscuits	2006/01/16	20	\$ 7.30	\$ 146.00
East Coast	Lavin. T	Condiments	Original Frankfurter grüne Soße	2006/01/16	35	\$ 10.40	\$ 364.00
East Coast	Perks. M	Beverages	Côte de Blaye	2006/01/16	50	\$ 210.80	\$ 10 540.00
East Coast	Anderson. P	Confections	Teatime Chocolate Biscuits	2006/01/21	4	\$ 7.30	\$ 29.20
East Coast	Johnson. A	Seafood	Rod Kaviar	2006/01/21	20	\$ 12.00	\$ 240.00
East Coast	Peters. K	Confections	Gumbar Gummibarchen	2006/01/22	2	\$ 24.90	\$ 49.80
East Coast	Bonders. P	Dairy Products	Gorgonzola Telino	2006/01/23	14	\$ 10.00	\$ 140.00
East Coast	Newson. L	Meat/Poultry	Pâté chinois	2006/01/24	10	\$ 19.20	\$ 192.00
East Coast	Lavin. T	Grains/Cereals	Gnocchi di nonna Alice	2006/01/30	30	\$ 30.40	\$ 912.00
East Coast	Perks. M	Meat/Poultry	Tourtière	2006/01/31	40	\$ 5.90	\$ 236.00
East Coast	Anderson. P	Grains/Cereals	Gustafs Knäckebröd	2006/02/04	12	\$ 16.80	\$ 201.60
East Coast	Johnson. A	Meat/Poultry	Perth Pasties	2006/02/05	15	\$ 26.20	\$ 393.00
East Coast	Peters. K	Beverages	Sasquatch Ale	2006/02/06	20	\$ 11.20	\$ 224.00
East Coast	Bonders. P	Grains/Cereals	Wimmers gute Semmelknödel	2006/02/07	6	\$ 26.60	\$ 159.60
East Coast	Newson. L	Beverages	Chang	2006/02/10	45	\$ 15.20	\$ 684.00
East Coast	Lavin. T	Confections	Pavlova	2006/02/10	49	\$ 13.90	\$ 681.10
East Coast	Perks. M	Condiments	Sirop d'érable	2006/02/10	90	\$ 22.80	\$ 2 052.00

2. Select any cell in the list
3. From the insert tab, in the tables group, select pivot table and click OK
4. Drag the category name and product name fields to the row labels area
5. Drag the quantity, unit price and product sales fields to the values area as given below



6. To display data for the products under the sea food category; select the drop down arrow under row labels and select sea food as below
7. The following pivot table will be given



Row Labels	Sum of Quantity	Sum of Unit Price	Sum of Product Sales
Seafood	27	41.9	345.4
Boston Crab Meat	2	14.7	29.4
Inlagd Sill	5	15.2	76
Röd Kaviar	20	12	240
Grand Total	27	41.9	345.4

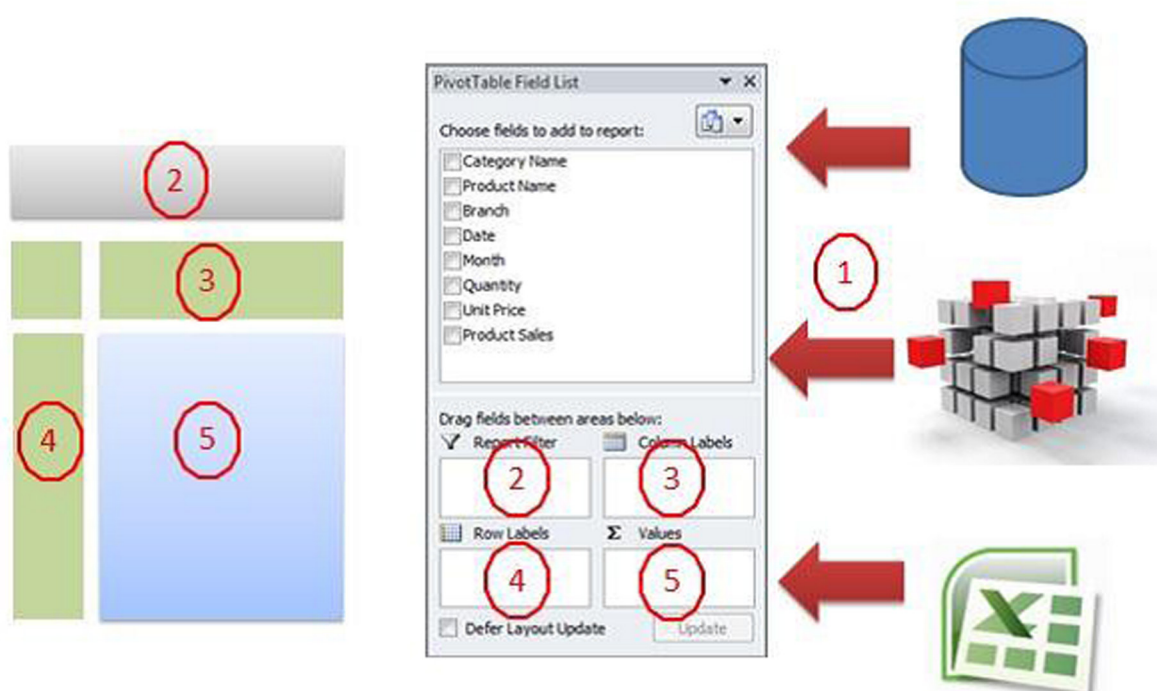
The data given in step 1 above can be summarized and queried in many user friendly ways

The Design of a PivotTable allows you to:

- Querying large amounts of data in many user-friendly ways
- Subtotaling and aggregating numeric data, summarizing data by categories and subcategories, and creating custom calculations and formulas
- Expanding and collapsing levels of data to focus your results, and drilling down to details from the summary data for areas of interest to you
- Moving rows to columns or columns to rows (or “pivoting”) to see different summaries of the source data
- Filtering, sorting, grouping, and conditionally formatting the most useful and interesting subset of data to enable you to focus on the information that you want
- Presenting concise, attractive, and annotated online or printed reports

Notes:

How a PivotTable Field List Works



1. Data Source (Excel, Cube, Database)
2. Report Filter (Department)
3. Column Label Area (Branch)
4. Row Label Area (Customer Name)
5. Values Area (Sales amount)



Tip 2: Multiple Data Consolidations for PivotTables

As an effective tool for working with large volumes of data, PivotTables can be used to summarize, organize and view the same data in many different ways quickly and easily. However the data is usually in one data source/range. Therefore by using the multiple data consolidation ranges option it is possible to extract data from more than one data source. It must be explained that the data can be in different formats or arranged differently.

Applies To: MS Excel 2003, 2007 and 2010

1. Enter the data given below in the three worksheets; sheet 1, sheet 2 and sheet 3 respectively

Sheet 1

	A	B
1	Product	Sales 2010
2	Annatto Seed	\$22 000
3	Anise Seeds	\$95 000
4	Asafoetida Powder	\$70 000
5	Basil Leaf	\$60 000
6	Bay Leaf	\$98 000
7	Caraway Seed	\$30 000
8	Cardamom Seed	\$25 000
9	Garlic	\$20 000

Sheet 2

	A	B
1	Product	Sales 2010
2	Annatto Seed	\$11 771
3	Anise Seeds	\$87 970
4	Asafoetida Powder	\$11 312
5	Basil Leaf	\$58 842
6	Bay Leaf	\$99 665
7	Caraway Seed	\$19 426
8	Cardamom Seed	\$22 772
9	Garlic	\$17 990

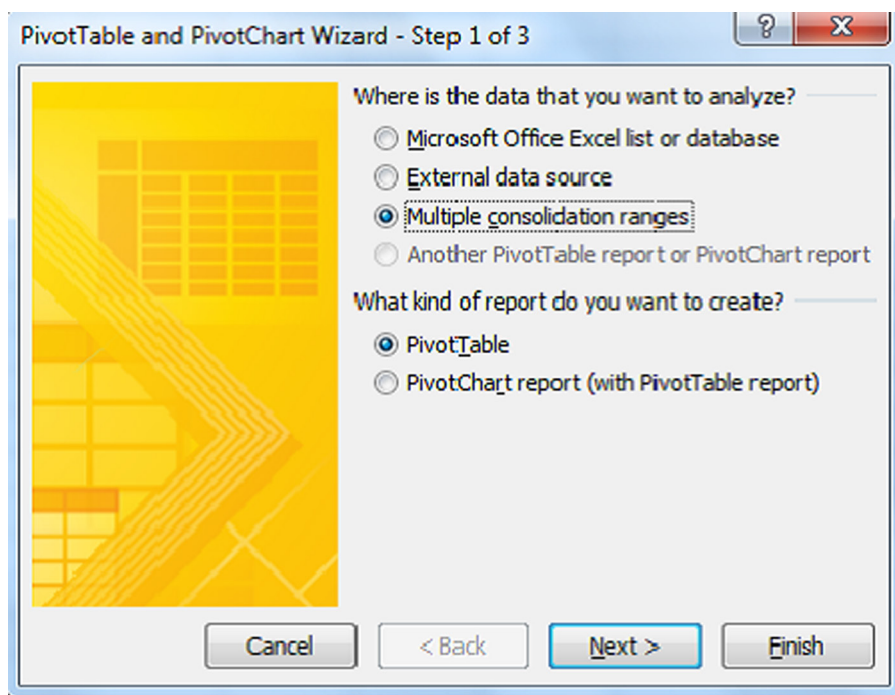
Sheet 3

	A	B
1	Product	Sales 2010
2	Annatto Seed	\$18 000
3	Anise Seeds	\$45 000
4	Asafoetida Powder	\$13 000
5	Basil Leaf	\$66 000
6	Bay Leaf	\$80 000
7	Caraway Seed	\$25 000
8	Cardamom Seed	\$25 000
9	Garlic	\$20 000

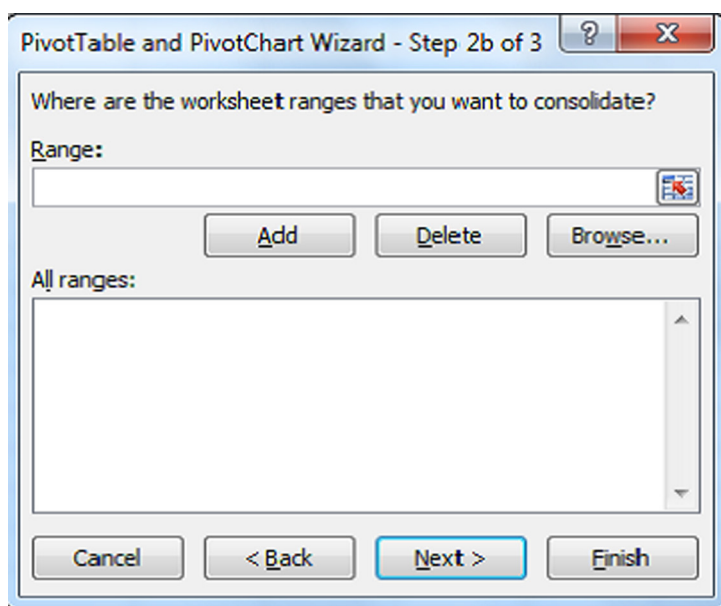
2. Insert/Select sheet 4
3. For Excel 2007 and 2010 press ALT + D and then press/type P
4. For Excel 2003, XP, 2000 and 97; click the Data menu and then PivotTable & PivotChart Report



5. The screen shot below will be displayed



6. Select Multiple consolidation ranges and PivotTable then click Next
7. Select create a single page field for me and then click next. The swcreen shot below will be displayed



8. Click on the red arrow(Edit Reference Icon) under Range and select the data range A1:B9 on sheet 1
9. Press Enter and click the add button
10. Repeat steps 8 & 9 for data on sheet 2 and sheet 3
11. Click on the next button and select Existing Worksheet then click Finish

As you can see a PivotTable with a multiple data consolidation range has been created. One can easily select the data to be displayed by selecting the appropriate option. The page option allows a user to select data for the respective worksheet. The worksheets are given as item 1, Item 2 and Item 3.



Tip 3: PivotTable Calculated Fields

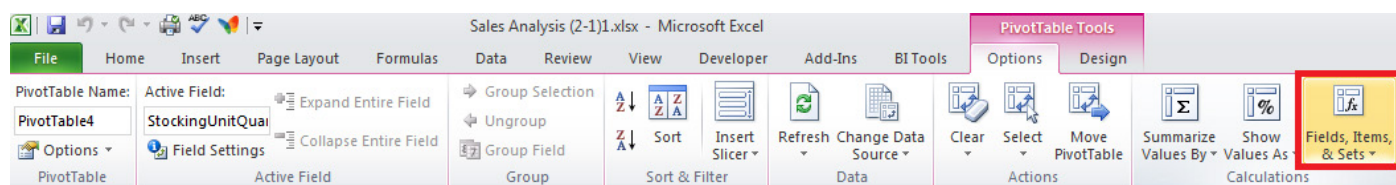
The Pivot Table formulae option can be used to create calculated fields to include in the Pivot Table. In the example below we create a calculated field that computes a mark-up of 25% on the sales figure and then calculate the profit.

Applies To: MS Excel 2003, 2007 and 2010

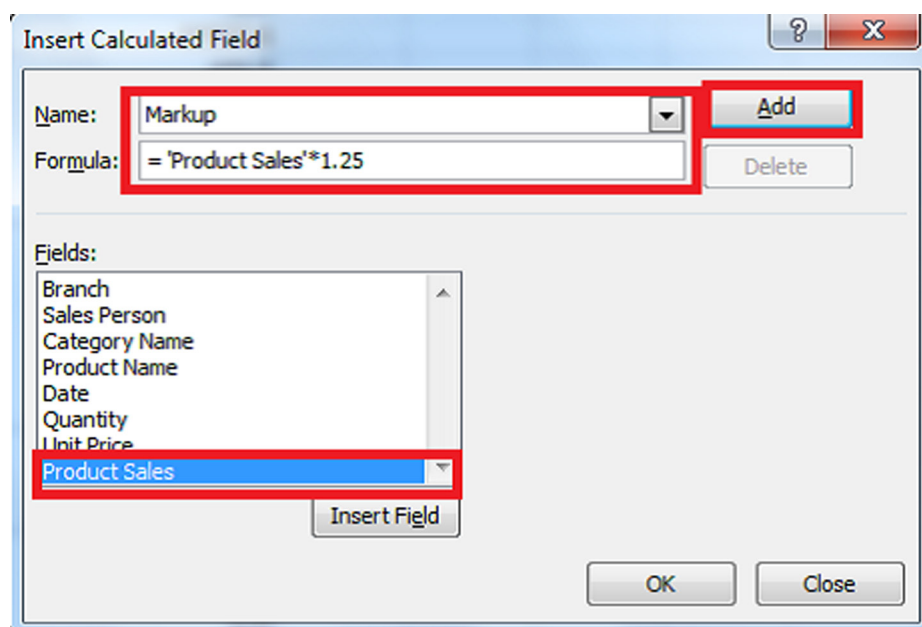
1. Select any cell in the PivotTable as in the example below

Values			
Row Labels	Sum of Quantity	Sum of Unit Price	Sum of Product Sales
Seafood	27	41.9	345.4
Boston Crab Meat	2	14.7	29.4
Inlagd Sill	5	15.2	76
Röd Kaviar	20	12	240
Grand Total	27	41.9	345.4

2. Select as given below



3. The Insert a Calculated field window will open. Enter the following and select add



4. Rename the field on the PivotTable to Markup (double click on "sum of Markup" field, delete the words "sum of" and press enter)
5. Repeat the Process to calculate Profit
6. Enter the following and select add



7. Select OK
8. Rename the field on the PivotTable to Profit
9. The result will be as given below

		Values			
Row Labels	☒ Sum of Quantity	Sum of Unit Price	Sum of Product Sales	Markup	Profit
Seafood	27	41.9	345.4	432	86
Boston Crab Meat	2	14.7	29.4	37	7
Inlagd Sill	5	15.2	76	95	19
Röd Kaviar	20	12	240	300	60
Grand Total	27	41.9	345.4	432	86

The Markup and Profit figures have been computed by way of adding two calculated fields to the PivotTable.



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Tip 4: Using Value Field Settings in PivotTables

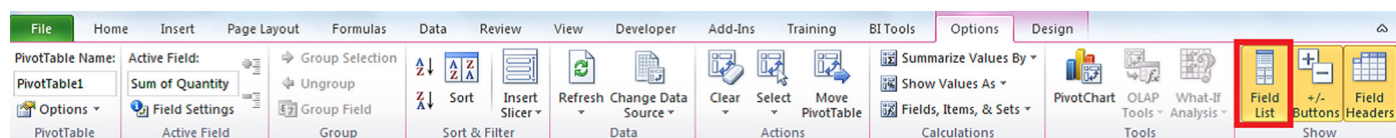
By using the value field settings in Pivot Tables one can analyse the same field differently. In the example below I would like to have two fields for analyzing sales in the PivotTable, one in a percentage format and the other in a value format. The Product Sales field will therefore be added twice to the values area.

Applies To: MS Excel 2003, 2007 and 2010

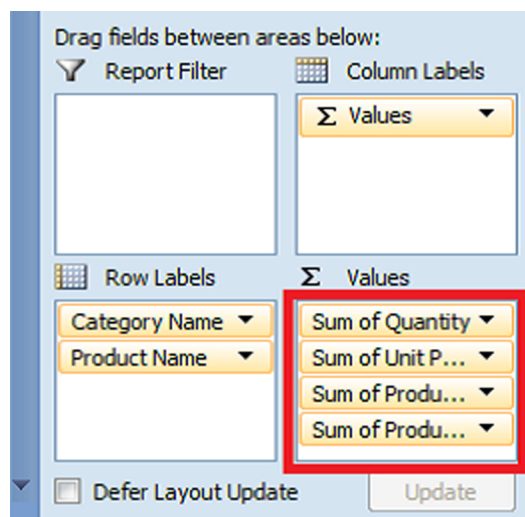
1. Select any cell in the PivotTable as given in the example below.

Values			
Row Labels	Sum of Quantity	Sum of Unit Price	Sum of Product Sales
Seafood	27	41.9	345.4
Boston Crab Meat	2	14.7	29.4
Inlagd Sill	5	15.2	76
Röd Kaviar	20	12	240
Grand Total	27	41.9	345.4

2. If the Pivot Table field list is not displayed select field list button on the Options tab in Excel.



3. Add the product Sales column to the values area again. Refer to the screen shot given below.



4. Change the Sum of Product Sales2 field to a %;
(a) Right click on the field Sum of Product Sales 2 in the pivot table
(b) Select values field setting and select as below



Value Field Settings

Source Name: Product Sales

Custom Name: Sum of Product Sales2

Summarize Values By: Show Values As

Show values as

% of Column Total

Base field:

Branch
Sales Person
Category Name
Product Name
Date
Quantity

Base item:

Number Format

OK Cancel

5. The result will be the pivot table shown below.

Row Labels	Values			
	☒ Sum of Unit Price	Sum of Quantity	Sum of Product Sales	Sum of Product Sales2
Seafood	41.9	27	345.4	100.00%
Boston Crab Meat	14.7	2	29.4	8.51%
Inlagd Sill	15.2	5	76	22.00%
Röd Kaviar	12	20	240	69.48%
Grand Total	41.9	27	345.4	100.00%

The analysis of sales by percentage and values can thus be performed. One can easily compare the sales of the various products by looking at the percentage column for the product sales. You can now change the name of the Fields to be more appropriate. I.e. Sum of Product Sales = Product Sales Total; Sum of Product Sales2 = % of Total Sales.

Control Keys

- Alt+A Selects the entire worksheet
- Alt+C Copy the selection
- Alt+D Fill down
- Alt+F Find the Find dialog box
- Alt+V Paste
- Alt+W Right
- Alt+Y Choose the Outline view
- Alt+Z Undo the last command

Function Keys

- F1 Display Help on the Office Assistant
- F2 Create an embedded chart of the data in the current worksheet
- F3 Insert a new row
- F4 Add or delete a row
- F5 Paste a name into a formula
- F6 Display a formula bar
- F7 Hide columns
- F8 Displays the Format Cells dialog box
- F9 Applies or removes bold formatting
- F10 Displays the Find dialog box
- F11 Static formatting is overwritten in worksheet
- F12 Displays the outline symbols
- F13 on the cell above cell or formula bar
- F14 displaying in the cells
- F15 Insert in the worksheet
- F16 Displays the Outline view
- F17 Displays the Outline view
- F18 Displays the Outline view
- F19 Displays the Outline view
- F20 Displays the Outline view

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Tip 5: Slicers

In earlier versions of Microsoft Excel, you can use report filters to filter data in a PivotTable report but it is not easy to see the current filtering state when you filter on multiple items. In Microsoft Excel 2010, you have the option to use slicers to filter the data.

Slicers provide buttons that you can click to filter PivotTable data. In addition to quick filtering, slicers also indicate the current filtering state, which makes it easy to understand what exactly is shown in a filtered PivotTable report.

Row Labels	Sum of Order Amount
USA	28573.82
Callahan	28573.82
Qtr2	28573.82
Grand Total	28573.82

Country	Salesperson	Order Date
USA	Callahan	Qtr1
USA	Callahan	Qtr2
USA	Callahan	Qtr3
USA	Callahan	Qtr4
USA	Callahan	+7/18/2008
USA	Callahan	+5/2/2011

Applies To: MS Excel 2010

1. Create a slicer
 - a. Click the PivotTable for which to create a slicer
 - b. On the Options, in the Sort & Filter group, click Insert Slicer
 - c. In the Insert Slicers dialogue box, click the check box for the fields for which you want to create a slicer
 - d. Click OK
2. Formatting Multiple Slicers

If you are formatting multiple slicers, or wish to hide a slicer, you can use the Selection and Visibility pane

 - a. On the Options tab, in the Arrange group, click Selection Pane



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Tip 6: Sharing Slicers Between PivotTables

When you have many different PivotTables in one report, such as a Business Intelligence (BI) report that you are working with, it is likely that you will want to apply the same filter to some or all of those PivotTables. You can share a slicer that you created in one PivotTable with other PivotTables. No need to duplicate the filter for each PivotTable.

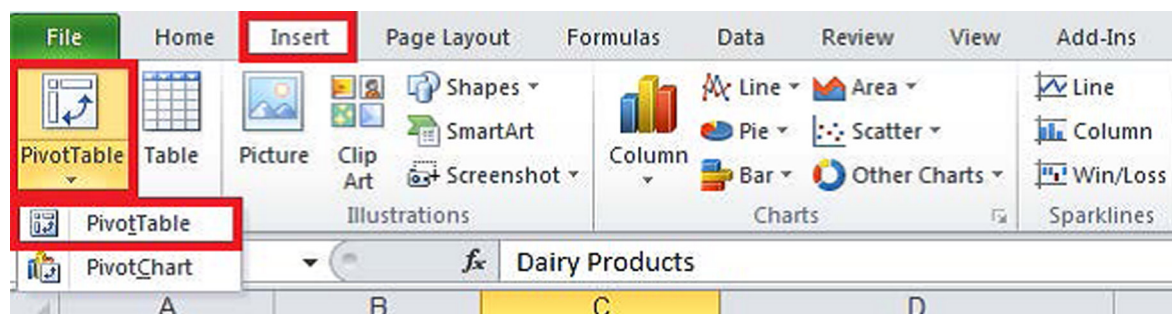
For example, if you use a Region slicer in PivotTable2 to filter data for a specific Region, PivotTable1 that also uses that slicer will display data for the same Region.

Applies To: MS Excel 2010

1. This tip will be based on the screen shot below

	A	B	C	D	E
1	Region	Sales Person	Category Name	Product Name	Product Sales
2	East Coast	Anderson. P	Confections	Maxilaku	\$ 432.00
3	North Coast	Johnson. A	Grains/Cereals	Gnocchi di nonna Alice	\$ 248.11
4	East Coast	Peters. K	Grains/Cereals	Tunnbröd	\$ 425.60
5	South Coast	Bonders. P	Confections	Pavlova	\$ 26.46
6	East Coast	Newson. L	Grains/Cereals	Singaporean Hokkien Fried Mee	\$ 68.40
7	East Coast	Lavin. T	Seafood	Boston Crab Meat	\$ 144.00
8	West Coast	Perks. M	Seafood	Inlagd Sill	\$ 432.00
9	East Coast	Anderson. P	Beverages	Chai	\$ 504.00
10	East Coast	Johnson. A	Dairy Products	Gudbrandsdalsost	\$ 345.60
11	North Coast	Peters. K	Dairy Products	Queso Cabrales	\$ 146.00
12	East Coast	Bonders. P	Beverages	Chai	\$ 364.00
13	South Coast	Newson. L	Confections	Teatime Chocolate Biscuits	\$ 10 540.00
14	West Coast	Lavin. T	Condiments	Original Frankfurter grüne Soße	\$ 24.82
15	East Coast	Perks. M	Beverages	Côte de Blaye	\$ 216.00
16	East Coast	Anderson. P	Confections	Teatime Chocolate Biscuits	\$ 49.80
17	South Coast	Johnson. A	Seafood	Röd Kaviar	\$ 140.00
18	East Coast	Peters. K	Confections	Gumbär Gummibärchen	\$ 144.00
19	North Coast	Bonders. P	Dairy Products	Gorgonzola Telino	\$ 912.00
20	East Coast	Newson. L	Meat/Poultry	Pâté chinois	\$ 236.00
21	North Coast	Lavin. T	Grains/Cereals	Gnocchi di nonna Alice	\$ 201.60
22	East Coast	Perks. M	Meat/Poultry	Tourtière	\$ 393.00
23	West Coast	Anderson. P	Grains/Cereals	Gustafs Knäckebröd	\$ 179.20
24	South Coast	Johnson. A	Meat/Poultry	Perth Pasties	\$ 159.60

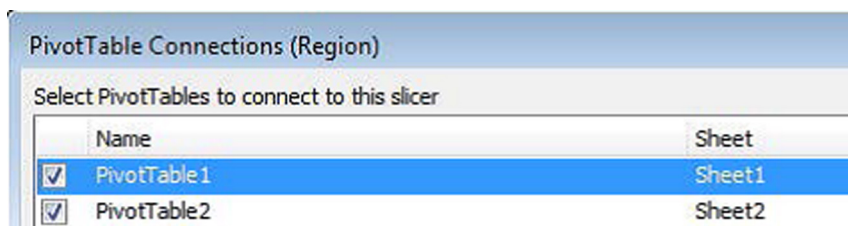
2. To create the first PivotTable select as below.



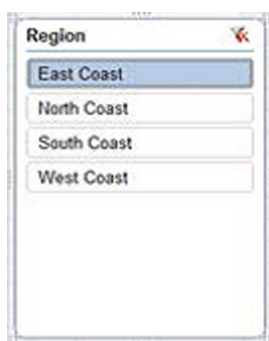
3. Select OK
4. Drag and place the Sales Person and Product Sales fields under the Row Labels and Values area respectively
5. Select the source worksheet and repeat steps 2 & 3
6. Drag and place the Product Name and Product Sales fields under the Row Labels and Values areas respectively
7. Select any cell within PivotTable2



8. Select Insert - Slicer under the Filter group
9. Select the Region field
10. Select OK
11. Right Click on the Region Slicer and select PivotTable Connections
12. Ensure that both PivotTable1 & PivotTable2 are selected



13. Select OK
14. Select East Coast from the Region Slicer. Only data for the East Coast will be displayed on both PivotTables



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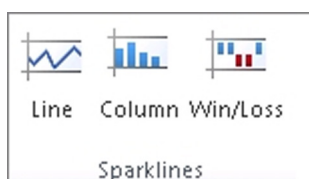


Tip 7: Creating a Sparkline

In Microsoft Excel 2010, a sparkline is a tiny chart in a worksheet cell that provides a visual representation of data. Use sparklines to show trends in a series of values, such as seasonal increases or decreases, economic cycles, or to highlight maximum and minimum values. Position a sparkline near its data for greatest impact.

Applies To: MS Excel 2010

1. Select an empty cell or group of empty cells in which you want to insert one or more sparklines.
2. On the Insert tab, in the Sparklines group, click the type of sparkline that you want to create: Line, Column, or Win/Loss.



3. In the Data Range box, type the range of the cells that contain the data on which you want to base the sparklines.

Note You can click  to temporarily collapse the dialog box, select the range of cells that you want on the worksheet, and then click  to restore the dialog box to its normal size.

Sum of Product Sales														Column Labels
Row Labels	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total	
East Coast	18159.9	14570.8	8543	10638	12700.5	7654.45	17274.05	10516.7	19067.18	13822.05	7850.8	21182.15	161979.58	
North Coast	14980.3	8324.2	10588	6656.35	12886.1	9641.55	12394.6	8999.3	20443.94	13622.82	16073.15	21202.09	155812.4	
South Coast	10549.5	9615.4	7909.3	8353.7	17791.95	9809.6	12335	16518.4	10072.05	17796.55	9320.4	17018.4	147090.25	
West Coast	23003.1	8696.8	12939.6	30051.34	13445.15	11982.4	13461.28	13947.29	10149.85	25087.08	12669.01	18073.62	193506.52	
Grand Total	66692.8	41207.2	39979.9	55699.39	56823.7	39088	55464.93	49981.69	59733.02	70328.5	45913.36	77476.26	658388.75	

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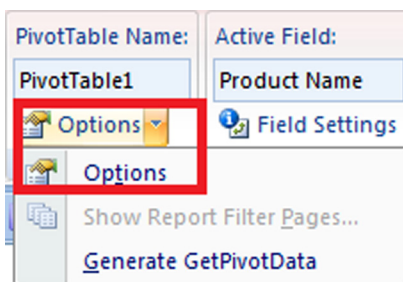


Tip 8: Maintaining formatting when refreshing PivotTables

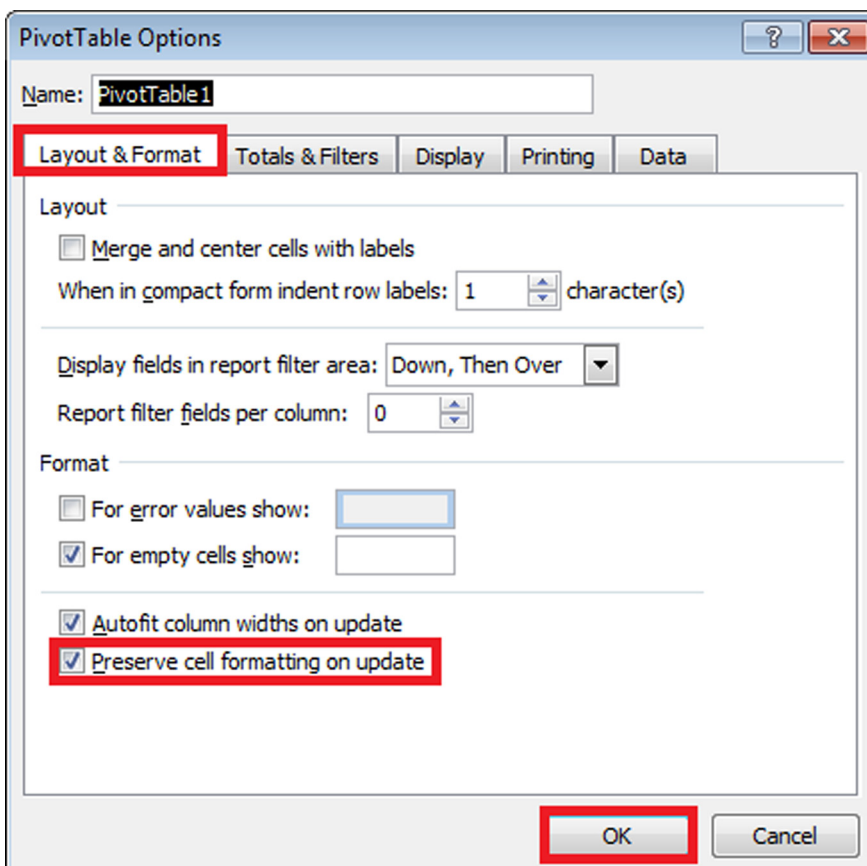
Should you want to preserve cell formatting when the Pivot Table is updated then follow the steps below.

Applies To: MS Excel 2003, 2007 and 2010

1. Format the PivotTable in whatever way you want
2. Select any cell within the Pivot Table
3. Select the Options Tab on the Ribbon
4. Then select as below



5. Select the **Preserve Formatting Option** as given below





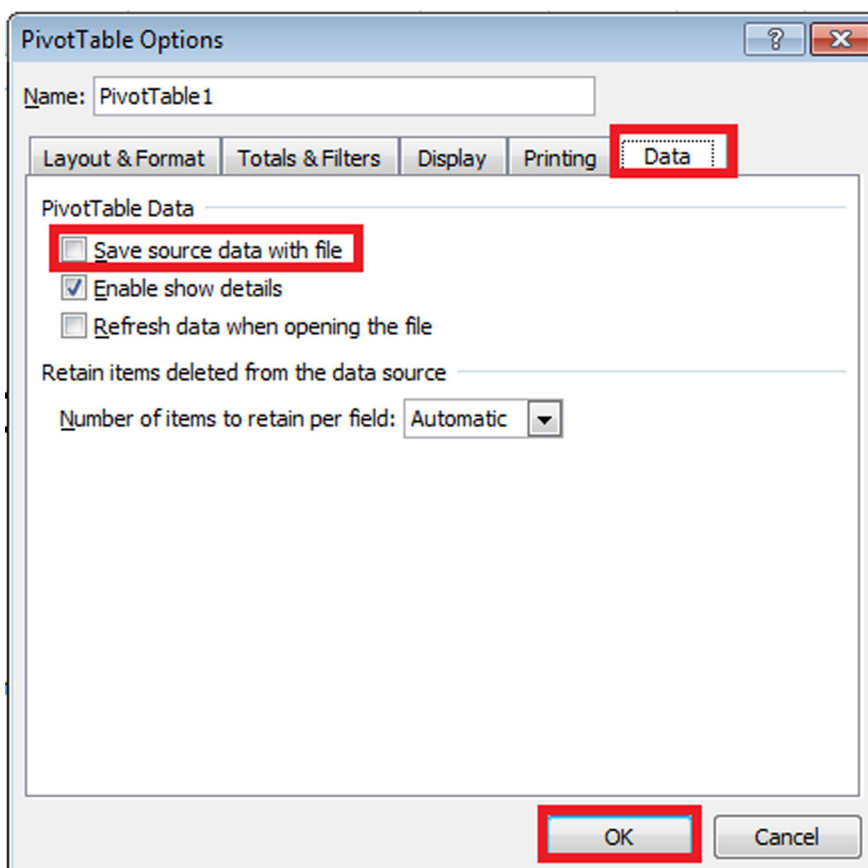
Tip 9: Limiting The Size of PivotTables

The size of an Excel file increases when a PivotTable is included. To reduce the file size one must do the following:

PivotTables by default always save the actual data with the layout of the table and this causes the increase in the size of the file. You can however change this on the table options of the PivotTable. Once you have changed this, you will always have to refresh the table before you can use it.

Applies To: MS Excel 2003, 2007 and 2010

1. Right click anywhere on the PivotTable
2. Select Pivot Table Options from the shortcut menu
3. Select as below and clear the “save Source data with file” checkbox



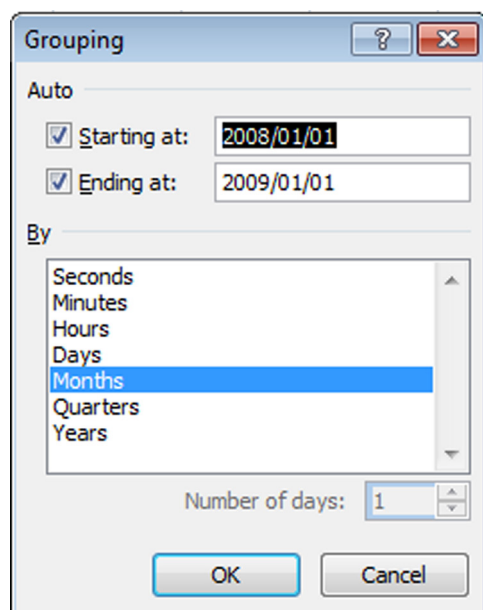


Tip 10: Grouping Dates in a PivotTable

Let's say you have a Pivot Table with date values and you want to analyse the dates by months or quarters. Then this can be easily done by using the Grouping feature in the PivotTable.

Applies To: MS Excel 2003, 2007 and 2010

1. Select the field (Date) you wish to group
2. Right click on any date value and select and Group
3. The grouping dialogue box appears displaying dates and times



4. Type the starting and ending information in the fields provided
5. Select the option you wish to group by in the By list
6. Select OK
7. Group dates will only work if you have NOT got blank cells selected in the source data. If you do have blank cells selected, please re-select the area.



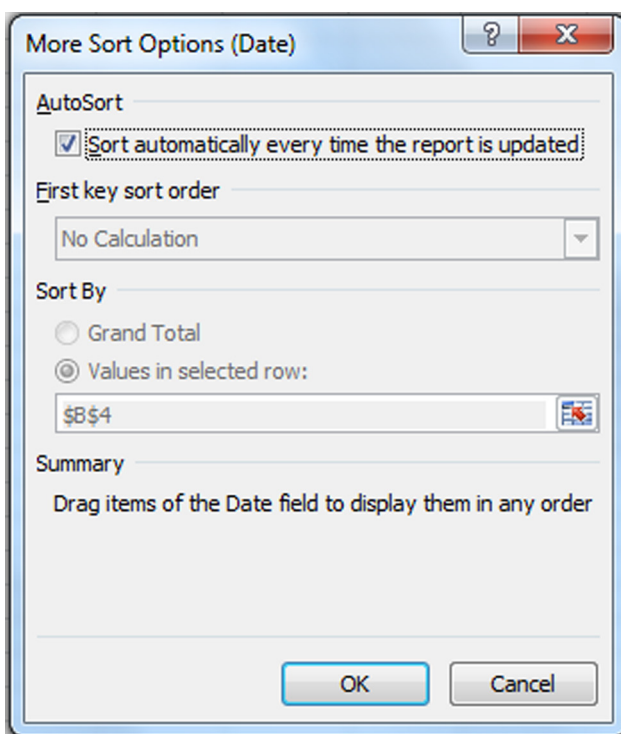


Tip 11: Customising Sort Options In a PivotTable

Since sorting of data is a vital option, Pivot Tables also allow users to sort the data .Furthermore they can also customise how the sort options can be done. These steps are explained below.

Applies To: MS Excel 2003, 2007 and 2010

1. Select any cell in the column you would like to sort in the PivotTable
2. From the Home tab, in the Editing group, select Sort & Filter
3. Select Custom Sort
4. Select More Options
5. De-select, Sort automatically every time the report is updated
6. From the drop down arrow, select the sort order e.g. Jan, Feb, Mar
7. Select OK



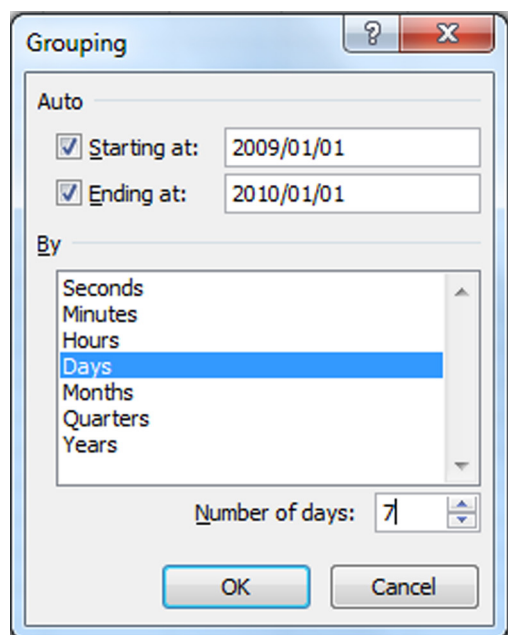


Tip 12: Grouping Data In a PivotTable By Days of the Week

Extending PivotTable functionality even further, data can be grouped into preset categories such as days of the week. This allows the user to group or analyse dates by weeks.

Applies To: MS Excel 2003, 2007 and 2010

1. Select the Date field in the PivotTable
2. From the Options tab, in the Group group, select the Group Selection button
3. Under By, select Days
4. Next to Number of Days, select 7 Days
5. Select OK





Tip 13: Combinational Chart

If you want to create a chart that has both a line series and a column series, then a combinational chart is what you need. If you want to have both a line and a column graph in one chart, follow the steps below.

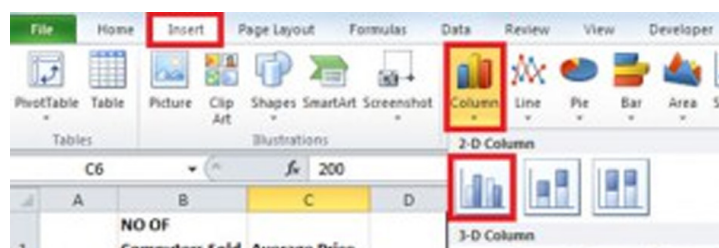
Applies To: MS Excel 2003, 2007, and 2010

1. Refer to the data given below

	A	B	C	D
1		NO OF Computers Sold	Average Price	
2	January	40	\$ 200	
3	February	50	\$ 300	
4	March	75	\$ 250	
5	April	85	\$ 350	
6	May	45	\$ 200	
7	June	70	\$ 250	
8	July	45	\$ 300	
9				

2. Select any cell within the data range

3. Select as below

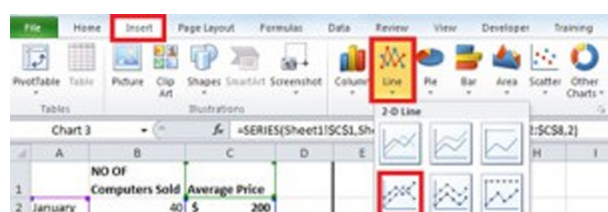


4. The following chart will be displayed

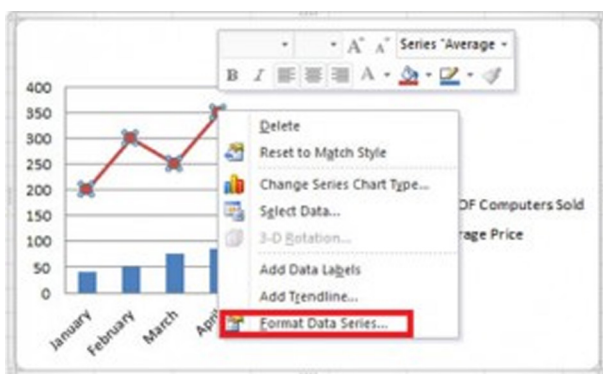
5. To insert the heading select the chart and select as below



6. Select the average price bars(series) in the chart and as below



7. Two charts (line and column will be displayed)
8. Right click on the line graph and select as below



9. Select Secondary axis and then the close button
10. The following chart will be displayed



Two graphs with separate axis have been combined in one chart. Therefore one can easily interpret the different sets of data in the chart.

Excel Financial Functions Quick Reference Guide

NPER function: Returns the number of periods for an investment.
Syntax: NPER(rate, pmt, pv, [fv], [type])
Syntax Example: NPER(0.05/12 (rate), -175 (pmt), 10000 (pv))
The Excel NPER function calculates the number of periods required to pay off a loan, for a specified constant periodic payment and a constant interest rate.

PV function: Returns the future value of an investment.
Syntax: PV(rate, nper, pmt, [fv], [type])
Syntax Example: PV(0.05/12 (rate), 3 years * 12 (nper), -1500 (pmt))
The Excel PV function calculates the future value of an investment with periodic constant payments and a constant interest rate.

PMT function: Returns the periodic payment for an annuity.
Syntax: PMT(rate, nper, pv, [fv], [type])
Syntax Example: PMT(0.05/12 (rate), 5 years * 12 (nper), 10000 (pv))
The Excel PMT function calculates the constant periodic payment required to pay off (or partially pay off) a loan or investment, with a constant interest rate, over a specified period.

IPMT function: Returns the interest payment for an investment for a given period.
Syntax: IPMT(rate, per, nper, pv, [fv], [type])
Syntax Example: IPMT(0.05/12 (rate), 4 (per), 5 years * 12 (nper), 50000 (pv))
The Excel IPMT function calculates the interest payment, during a specific period of a loan or investment that is paid in constant periodic payments, with a constant interest rate.

NETWORKDAYS function: Returns the number of working days between a start and end date.
Syntax: NETWORKDAYS(start_date, end_date, [holidays])
Syntax Example: NETWORKDAYS(D1012012 (start_date), D1012012 (end_date), D1012012 (holidays))
Returns the number of whole working days between a start and an end date. Working days exclude weekends (Saturday and Sunday) and any dates identified as holidays. Can be used to calculate the number of days per month, or the start of one month and the end of another.

NETWORKDAYS.INTL function: Returns the number of working days between a start and end date, allowing for different specified weekend patterns.

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Excel Financial Functions Quick Reference Guide

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Tip 14: Formatting the Chart Vertical Axis

If you have plotted a graph and want to change the scale of the vertical axis to suit your needs, MS Excel allows you to customize the vertical axis.

By default, MS Excel determines the minimum and maximum scale values of the vertical (value) axis. The y axis is usually the vertical axis and contains data. The x-axis is usually the horizontal axis and contains categories in a chart.

You can, however, customize the scale to better meet your needs. When the values that are plotted in the chart cover a very large range, you can also change the vertical (value) axis to a logarithmic scale (also known as log scale).

Applies To: MS Excel 2003, 2007, and 2010

1. Assuming that you have just plotted the graph below



2. To change the scale of the vertical axis to:

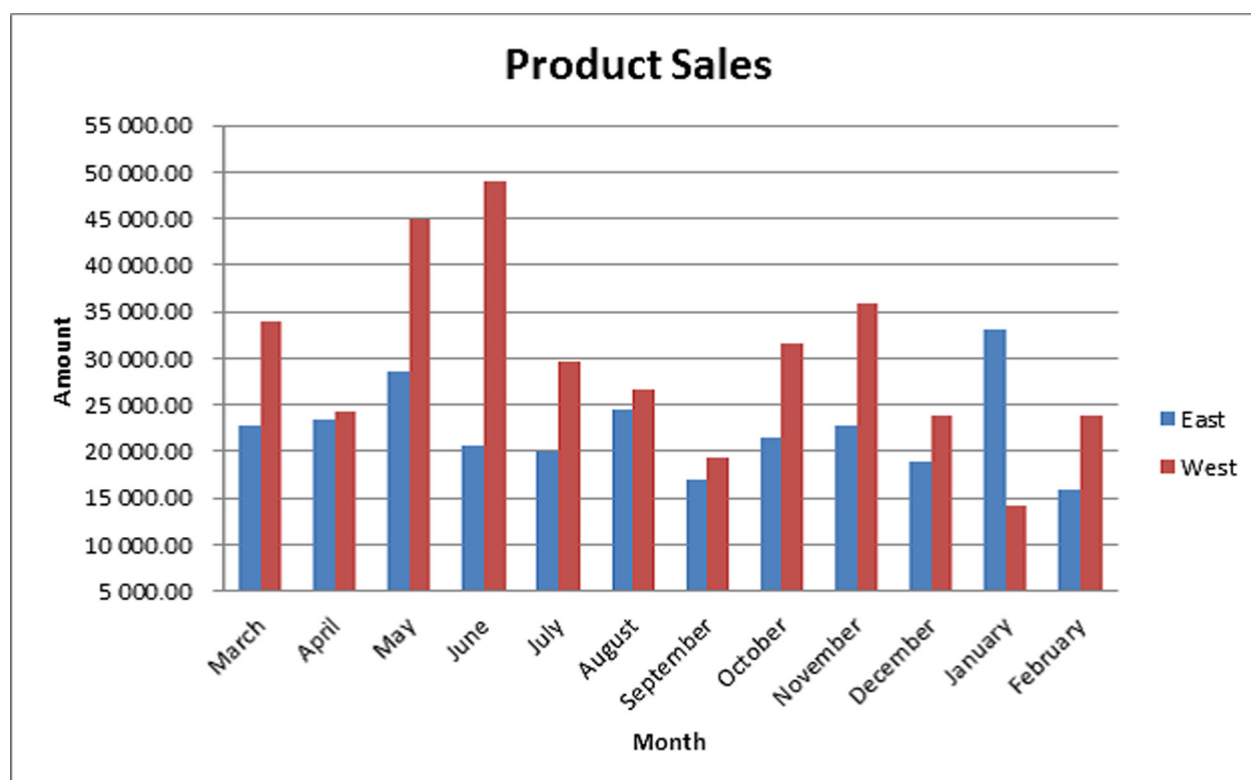
- Minimum value = 5000
- Maximum value = 55 000
- Major Unit = 5000

3. Right click on the vertical axis

4. Select format axis



5. Enter as per screen shot below



6. Select close

7. The chart above will be displayed with customised vertical axis values



Tip 15: Creating an Excel Graph From Scratch

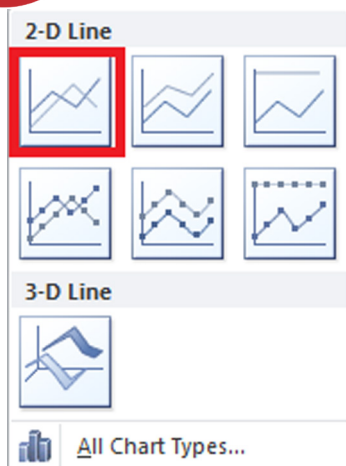
Ever tried to create an Excel graph from scratch? You can actually add your own Legend Entries (Series) and Horizontal (Category) Axis Labels. The location of the data should not hinder you from creating a graph. In the example below we explain how one can create a Sales Vs Purchases graph from scratch with the data located in different parts of the worksheet.

Applies To: MS Excel 2003, 2007 and 2010

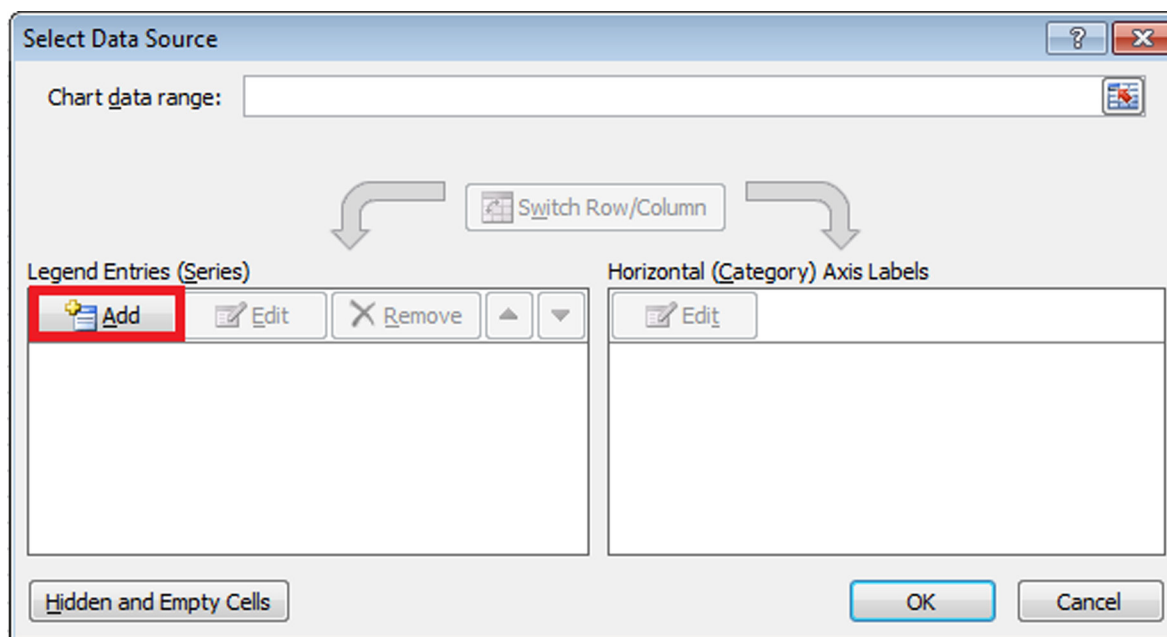
1. This tip will be based on the screen shot below

	A	B	C	D
1	<i>Analysis of Monthly Sales & Purchases by Branch</i>			
2				
3				
4	<i>Sales</i>	<i>East</i>	<i>West</i>	<i>Total Sales</i>
5	March	71973.28	55500.00	127473.28
6	April	41242.21	23340.00	64582.21
7	May	62072.53	11119.30	73191.83
8	June	53177.57	67070.11	120247.68
9	July	56476.58	12300.88	68777.46
10	August	56718.75	46660.35	103379.10
11	September	57806.72	59555.79	117362.51
12	October	65998.15	23330.00	89328.15
13	November	54007.50	32220.46	86227.96
14	December	52961.04	34230.00	87191.04
15	January	67310.62	36920.63	104231.25
16	February	38300.09	24601.75	62901.84
17		678045.04	426849.27	1104894.31
18				
19				
20				
21	<i>Purchases</i>	<i>East</i>	<i>West</i>	<i>Total Purchases</i>
22	March	22873.08	34005.77	56878.85
23	April	23389.60	24400.99	47790.59
24	May	28629.90	45000.77	73630.67
25	June	20738.00	48970.67	69708.67
26	July	19925.35	29760.00	49685.35
27	August	24444.44	26600.80	51045.24
28	September	16952.50	19450.59	36403.09
29	October	21469.55	31578.20	53047.75
30	November	22744.87	35890.00	58634.87
31	December	19014.56	23820.60	42835.16
32	January	33075.73	14300.40	47376.13
33	February	15913.55	23820.60	39734.15
34		269171.13	357599.39	626770.52

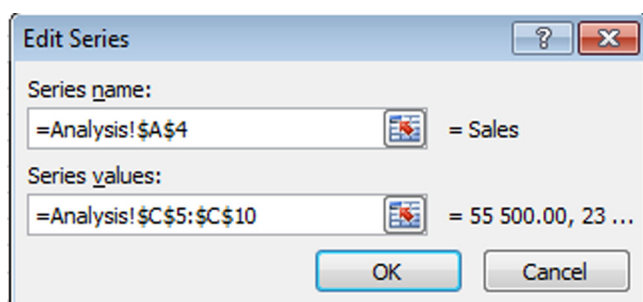
2. Select any blank cell on the worksheet
3. From the Insert tab, in the Charts group, select Line
4. Select 2-D Line as below:



5. A blank chart will be inserted
6. Select the blank chart
7. From the Design tab, in the Data group, select Select Data
8. Select the Add button in the Legend Entries (Series) box



9. Select as below



10. Select OK



11. Select Add and as below

Series name:
=Analysis!\$A\$21 = Purchases

Series values:
=Analysis!\$C\$22:\$C\$27 = 34 005.77, 24 ...

OK Cancel

12. Select OK
13. Select the Edit button in the Horizontal (Category) Axis Labels
14. Select as below

Axis label range:
=Analysis!\$A\$22:\$A\$33 = March, April, ...

OK Cancel

15. Select OK
16. Select OK
17. From the Layout tab, in the Labels group, select Chart Title
18. Select Above Chart
19. In the Chart Title box, enter Sales vs Purchases
20. Right click on the Chart and select Move Chart
21. Select New Sheet. A comparison Line graph as below will be displayed

