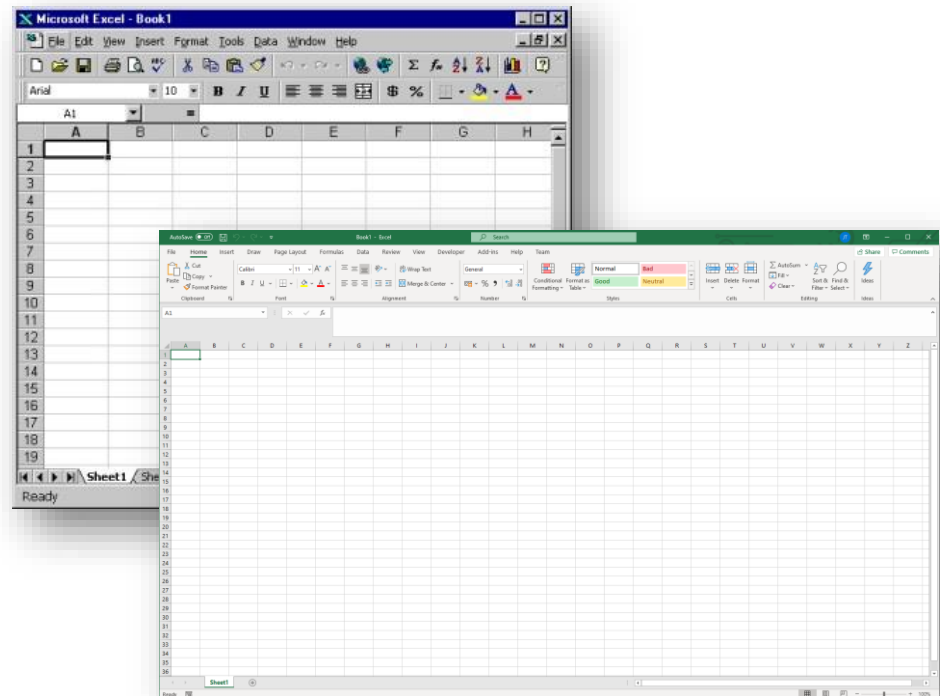# *Aim - Exploring charts in Excel*

The aim of the webinar : To explore how to use the many Chart options in Excel and apply the vast array of graphical choices and features that are available.

New features (ideas and waterfall charts) can only be applied in version 16 onwards

If your not sure which version you have type **=INFO("RELEASE")** in any cell
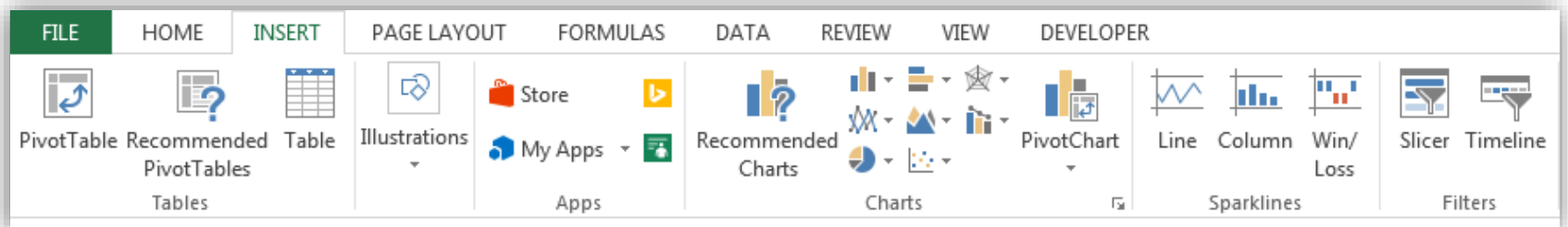
Agenda

1. Sparklines

2. Chart development

    • Axis bounds/position

    • Choices – block charts – stacking order

    • Double Axis

3. Ideas/Analyze Data – quick data presentation

4. Other

    • Trend lines

    • =NA

    • Waterfall charts

Sparklines

A great visual audit of how the numbers outside the screen area are sequencing. When reviewing a model ask yourself 'Is the profile of the series what I was expecting?'

Income Statement								
Revenue	£		15,084,459	╱		0	1,315,825	1,355,300	1,395,959
Cost of sales	£		(9,352,365)	╲		0	(815,812)	(840,286)	(865,494)
Gross Profit	£		5,732,094	╱		0	500,014	515,014	530,464
Staff cost	£		(2,479,637)	╲		0	(216,300)	(222,789)	(229,473)
Rent	£		(593,800)	╲		0	(55,000)	(55,000)	(55,000)

Located in the middle of the 'Insert' Ribbon

Quick Charts
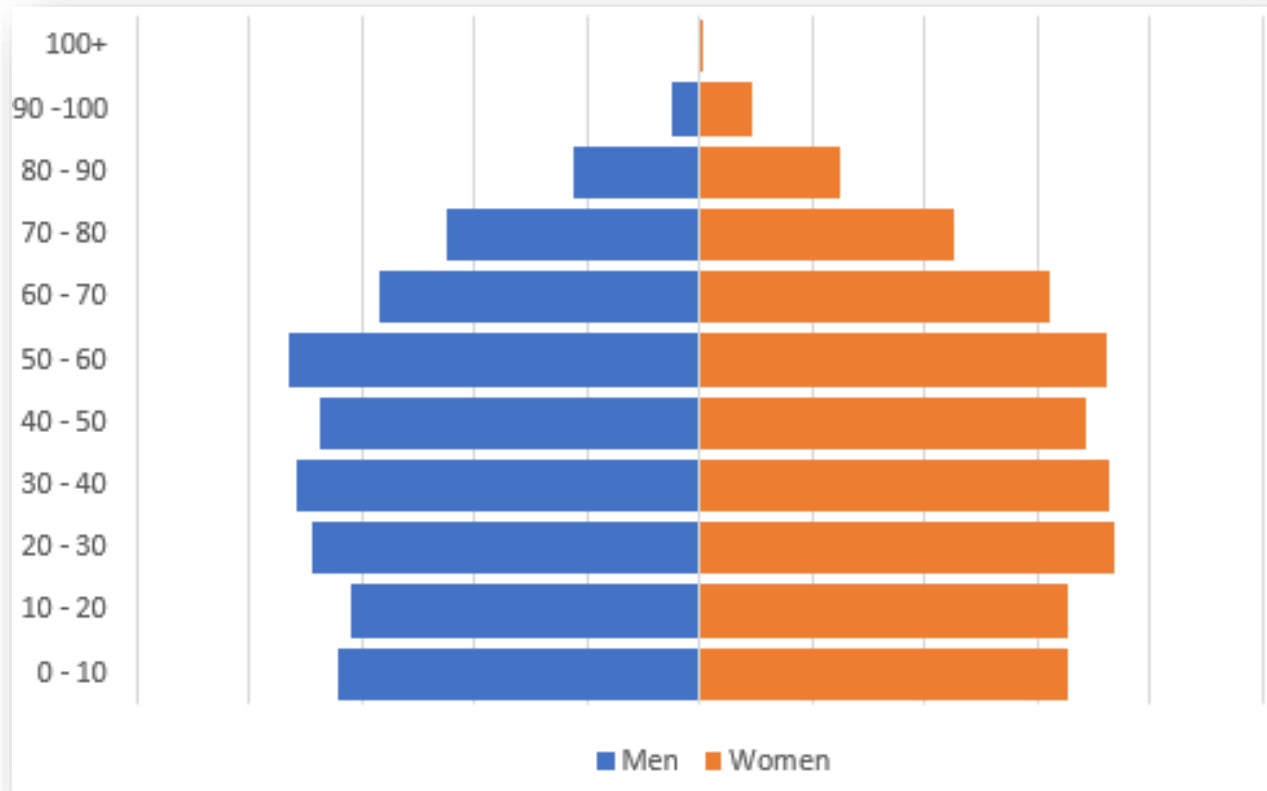
Top left corner must be blank
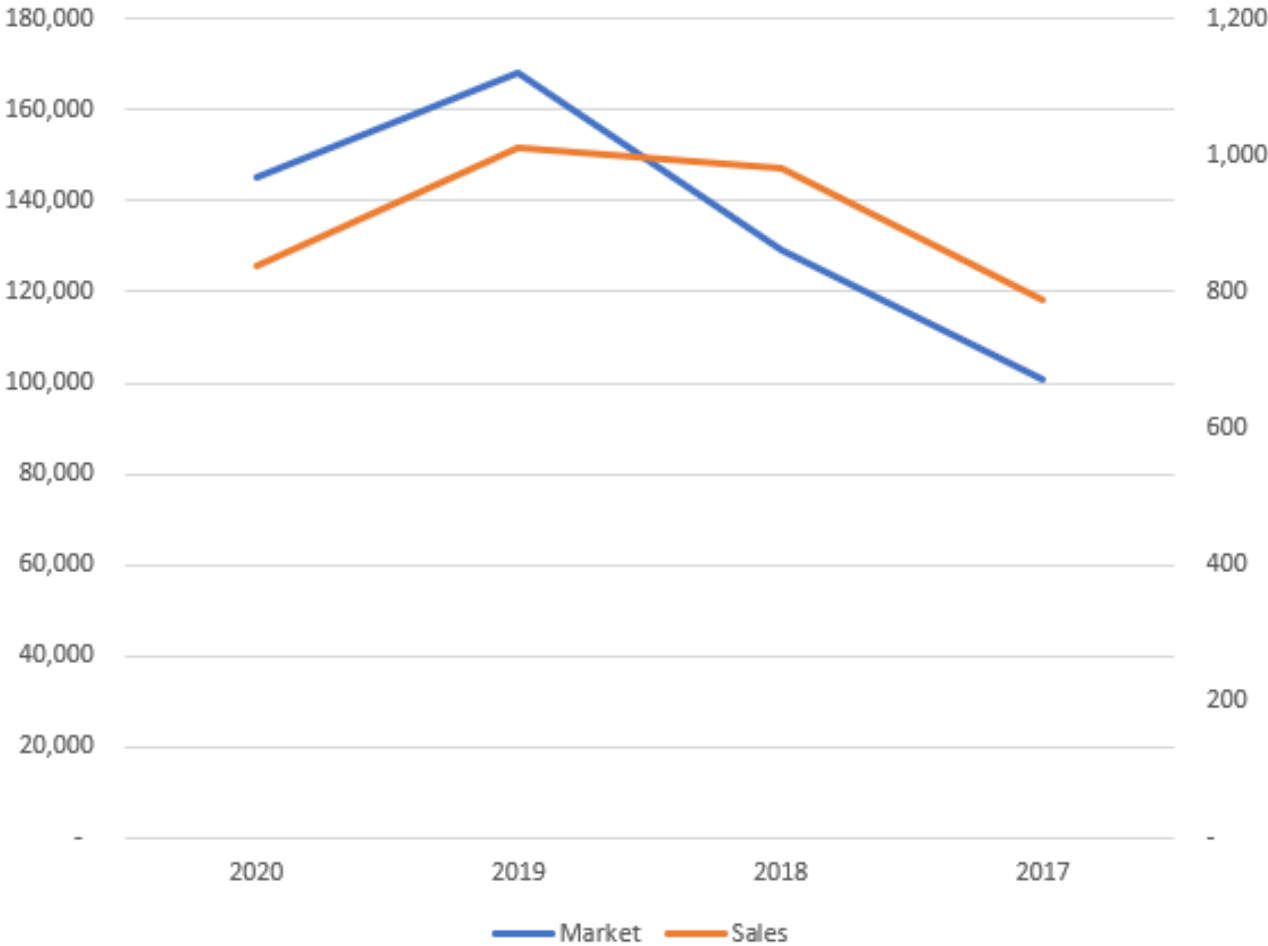
Block Charts

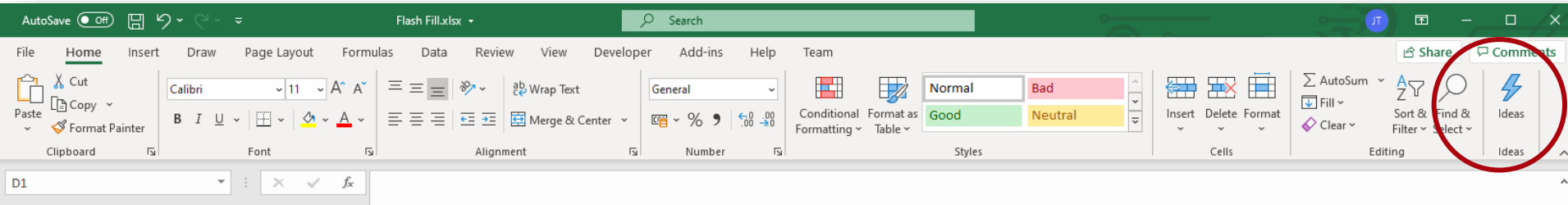Stacking order

Tornado Charts

In built Funnel – not as effective as a stacked bar
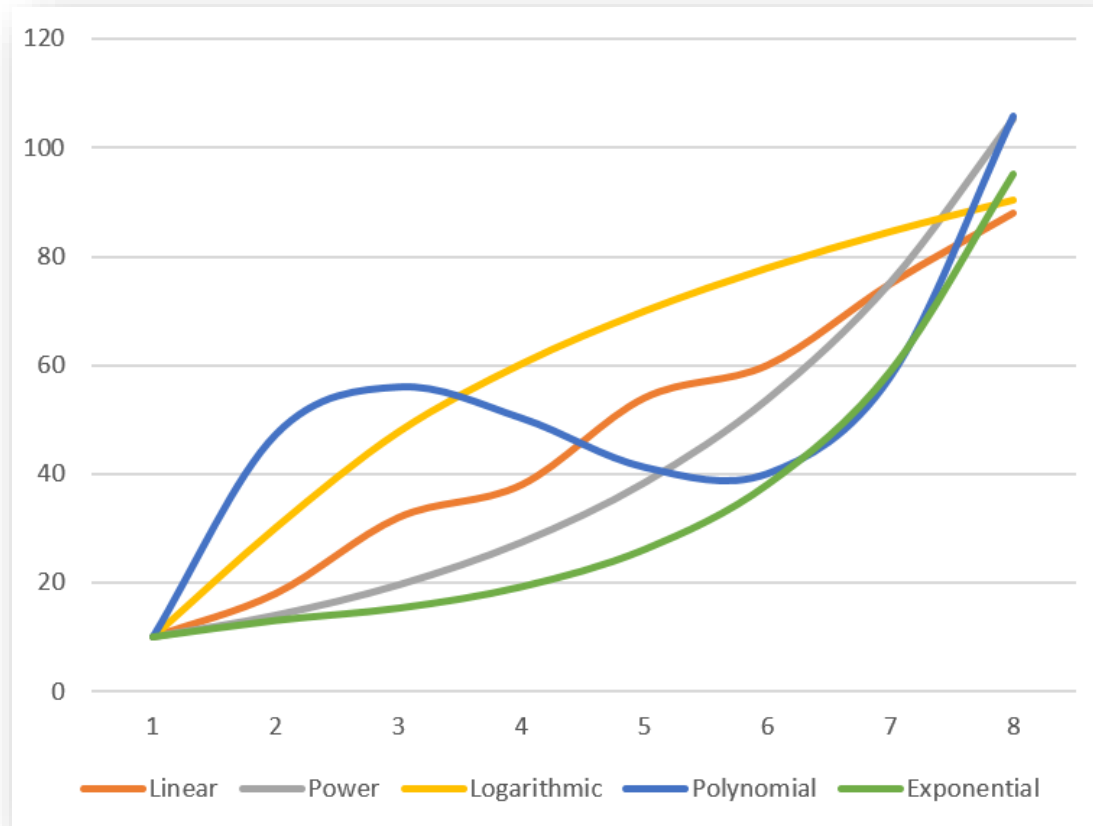
Double Axis

Ideas

Analyses your data and generates pivot tables and charts for you that can be dropped into your worksheet

Types of Trends

How can the patterns in past data help predict future values?
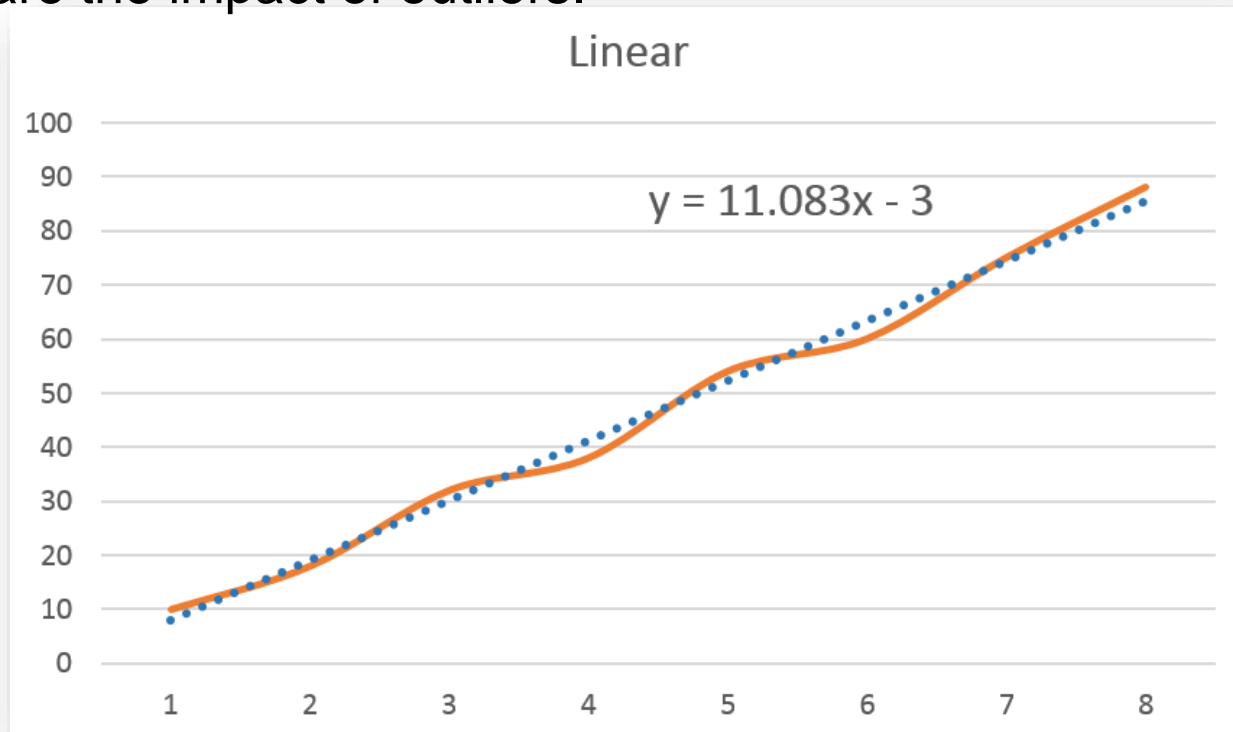

The key is to interpret the shape so a function can be derived

Regression = Line of best fit

Right click and 'Add Trendline' - linear and Click 'Display Equation' on Chart that will enable you to create a formula to project month 9 onwards.

Beware the impact of outliers.

Least Squared Regression

You can get the same results as Trendline with four functions. This enables you to automate forecasting without having to key in the equation.

Achieved with either **=FORECAST, =TREND** or **=SLOPE** and **=INTERCEPT** together.

=Forecast	96.75	=FORECAST(K3,C4:J4,C3:J3)
=Trend	96.75	=TREND(C4:J4,C3:J3,K3)
=Slope	11.08333	=SLOPE(C4:J4,C3:J3)
=Intercept	-3	=INTERCEPT(C4:J4,C3:J3)

Month 9 = (9* 11.08333) -3 = 96.75

=NA()

=NA() – Test data exists for a chart and use this within an IF statement. Chart lines are blank with =N/A rather than dropping to zero with a 0
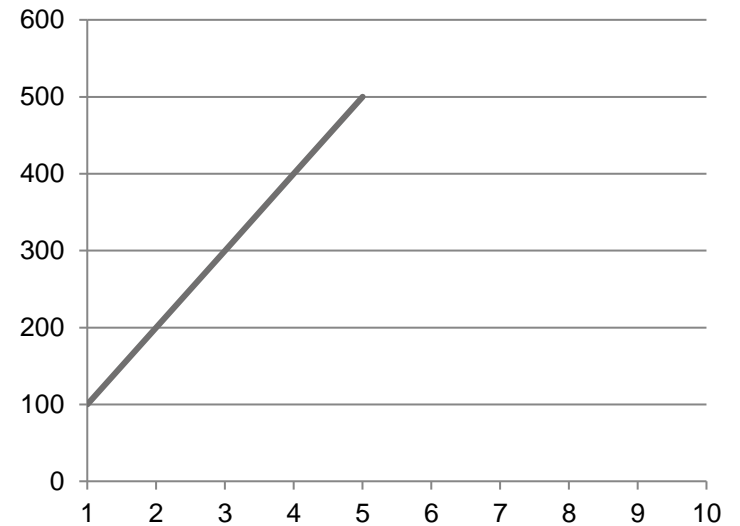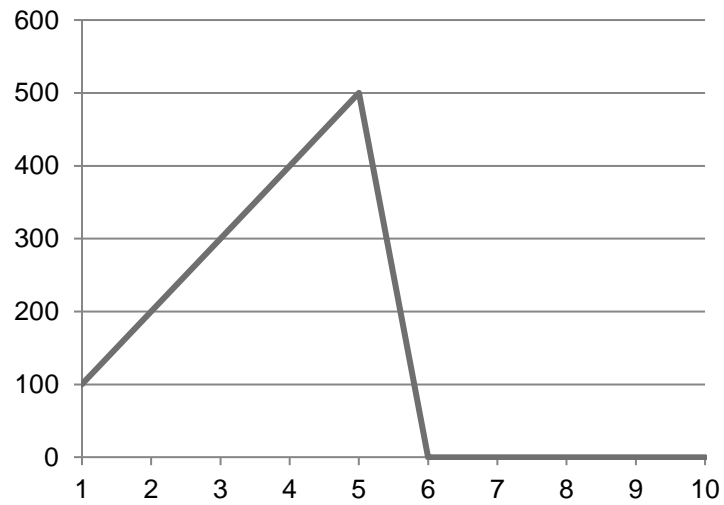
A Waterfall Chart

A great way to illustrate the causal factors in reconciling Budget to Actual results.

Detailed Profit Analysis of Sales per Day