

CREATING AN INTERACTIVE LEGEND

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LAB: CREATING AN INTERACTIVE LEGEND

You have been asked to create an interactive legend in Excel using no VBA.

MODULE REQUIREMENTS

- ▶ Insert form control check boxes.
- ▶ Link the check boxes to the spreadsheet.
- ▶ Link the chart to the results.

HINTS

For form control properties, right + click > Format Control ...

STEP-BY-STEP INSTRUCTIONS6

Click Steps

1. Open Module 10 – Checkbox Examples.xlsx. Start in Checkbox Toggle Example
2. From the Develop Tab, insert a new Form Control Checkbox. Place the checkbox over to the right. Click into the text and change it to “Show savings?”

Screen Shots

Check Box 1

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1									Transformation Table						
2	#	Month	COGS for Widget	COGS for Widgets w Improvements	Total Savings			COGS for Widget	COGS for Widgets w Improvements	Total Savings					
3	1	Jan	10	5	5										
4	2	Feb	20	15	5										
5	3	Mar	30	25	5										
6	4	Apr	40	30	10										
7	5	May	50	39	11										
8	6	Jun	60	42	18										
9	7	Jul	65	45	20										
10	8	Aug	70	55	15										
11	9	Sep	85	65	20										
12	10	Oct	90	75	15										
13	11	Nov	94	85	9										
14	12	Dec	100	90	10										
15															
16															
17															
18															

☐ Show Savings?

Click Steps

- Right-click the checkbox and select Format Control.
- From the Format Control dialog box, set the cell Link to cell =E16. Press OK. The control is now connected.
- Press the Checkbox on and off to test if the control is properly connected.

Screen Shots

The screenshot shows the 'Format Control' dialog box for a checkbox. The 'Value' section has three radio buttons: 'Unchecked' (selected), 'Checked', and 'Mixed'. The 'Cell link' is set to '=E16'. The '3-D shading' checkbox is unchecked. The background shows a table with columns for Month, COGS for Widget, COGS for Widgets w Improvements, and Total Savings.

#	Month	COGS for Widget	COGS for Widgets w Improvements	Total Savings
1	Jan	10	5	5
2	Feb	20	15	5
3	Mar	30	25	5
4	Apr	40	30	10
5	May	50	39	11
6	Jun	60	42	18
7	Jul	65	45	20
8	Aug	70	55	15
9	Sep	85	65	20
10	Oct	90	75	15
11	Nov	94	85	9
12	Dec	100	90	10

- Now, ensure the Show Savings? Checkbox is checked. If it's not, check it.
- Starting in cell I3, place the formula =E\$16 * 66E3 (as shown in the picture). Drag one cell to the right and then all the way down. Use the picture to ensure the numbers are correct. If only zeros are appearing, make sure the Show Savings? Checkbox is checked.

The screenshot shows the Excel spreadsheet with the formula =E\$16*E3 entered in cell I3. The formula bar shows the formula. The background shows the same table as the previous screenshot, with the 'Show Savings?' checkbox checked.

#	Month	COGS for Widget	COGS for Widgets w Improvements	Total Savings
1	Jan	10	5	5
2	Feb	20	15	5
3	Mar	30	25	5
4	Apr	40	30	10
5	May	50	39	11
6	Jun	60	42	18
7	Jul	65	45	20
8	Aug	70	55	15
9	Sep	85	65	20
10	Oct	90	75	15
11	Nov	94	85	9
12	Dec	100	90	10

Click Steps

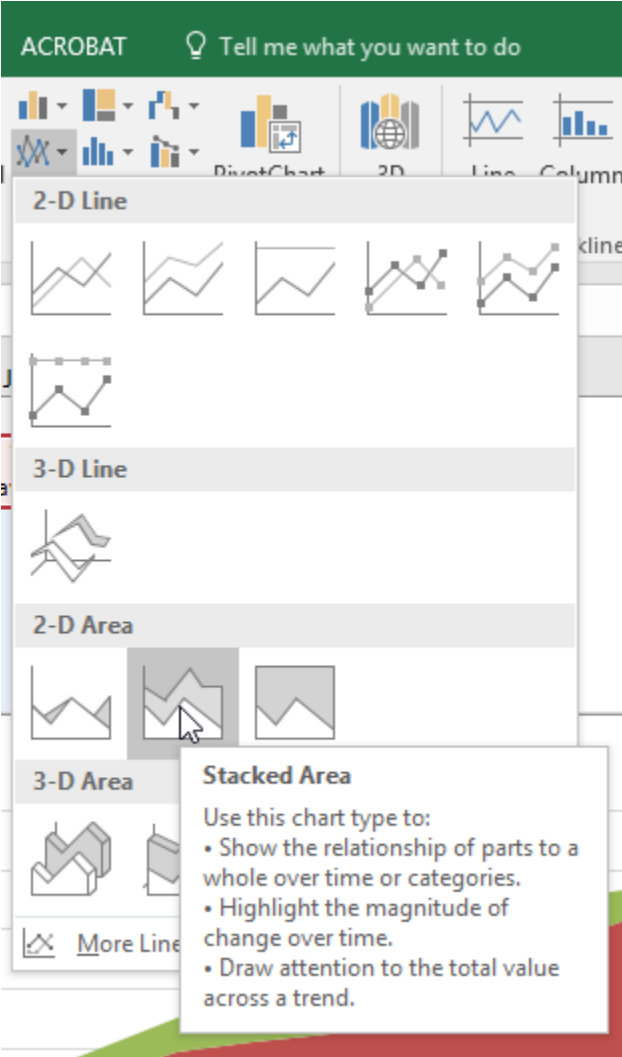
Screen Shots

8. Uncheck the Show Savings? Checkbox.
9. In cell H3, use the formula
`=NOT(E16) * D3`. Drag down. Use the picture to ensure the numbers being shown are correct. Again, if the numbers are zeros, make sure Show Savings is now unchecked.
10. Click the checkbox on and off to see the numbers toggle from being values to being zero.

SUM									
A	B	C	D	E	F	G	H	I	J
1							Transformation Table		
2	#	Month	COGS for Widget	COGS for Widgets w Improvements	Total Savings		COGS for Widget	COGS for Widgets w Improvements	Total Savings
3	1	Jan	10	5	5		=NOT(\$E3)	0	0
4	2	Feb	20	15	5		20	0	0
5	3	Mar	30	25	5		30	0	0
6	4	Apr	40	30	10		40	0	0
7	5	May	50	39	11		50	0	0
8	6	Jun	60	42	18		60	0	0
9	7	Jul	65	45	20		65	0	0
10	8	Aug	70	55	15		70	0	0
11	9	Sep	85	65	20		85	0	0
12	10	Oct	90	75	15		90	0	0
13	11	Nov	94	85	9		94	0	0
14	12	Dec	100	90	10		100	0	0
15									
16	Show Savings?		FALSE						
17	Chart Title								
18									

11. Highlight cells H2:J14.

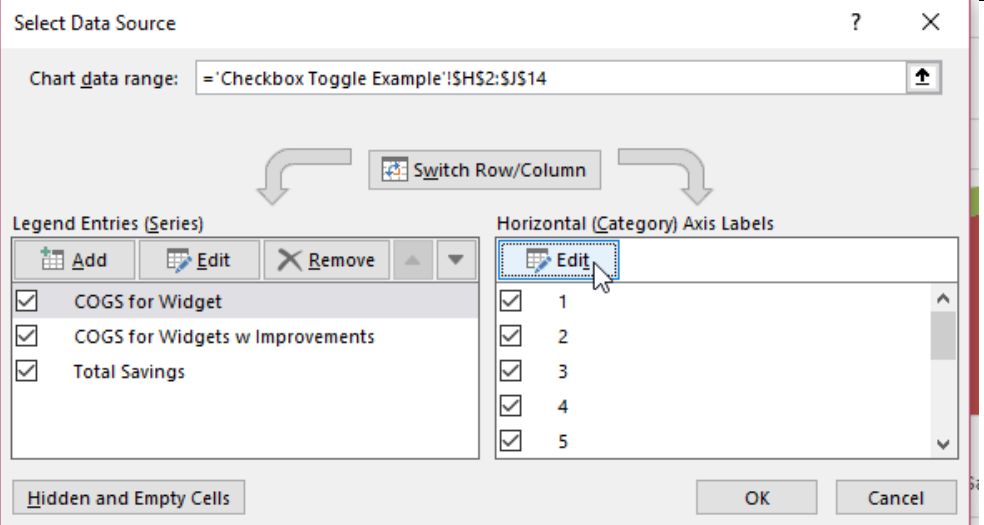
G	H	I	J	K
Transformation Table				
	COGS for Widget	COGS for Widgets w Improvements	Total Savings	
	0	5	5	
	0	15	5	
	0	25	5	
	0	30	10	
	0	39	11	
	0	42	18	
	0	45	20	
	0	55	15	
	0	65	20	
	0	75	15	
	0	85	9	
	0	90	10	

Click Steps	Screen Shots
<p>12. Insert a new 2-D Stacked Area Chart (from on the Insert tab).</p>	 <p>The screenshot shows the Microsoft Excel ribbon with the 'Insert' tab selected. The 'Line' group is expanded, showing various chart types. The '2-D Area' group is selected, and the 'Stacked Area' chart type is highlighted. A tooltip is displayed for the 'Stacked Area' chart type, providing instructions on when to use it.</p> <p>Stacked Area</p> <p>Use this chart type to:</p> <ul style="list-style-type: none">• Show the relationship of parts to a whole over time or categories.• Highlight the magnitude of change over time.• Draw attention to the total value across a trend.

Click Steps

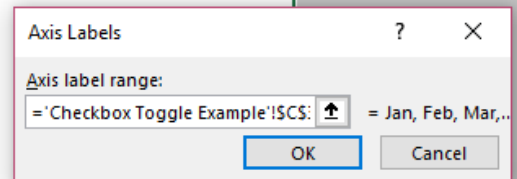
13. Ensure Show Savings? is checked. Right click into the chart and select Select Data...
14. Click the Edit tab on the right under Horizontal (Category) Axis Labels.

Screen Shots



15. Select cell C3:C14. Hit OK to set the labels. Hit OK again to exit the Select Data Source pop-up dialog box.

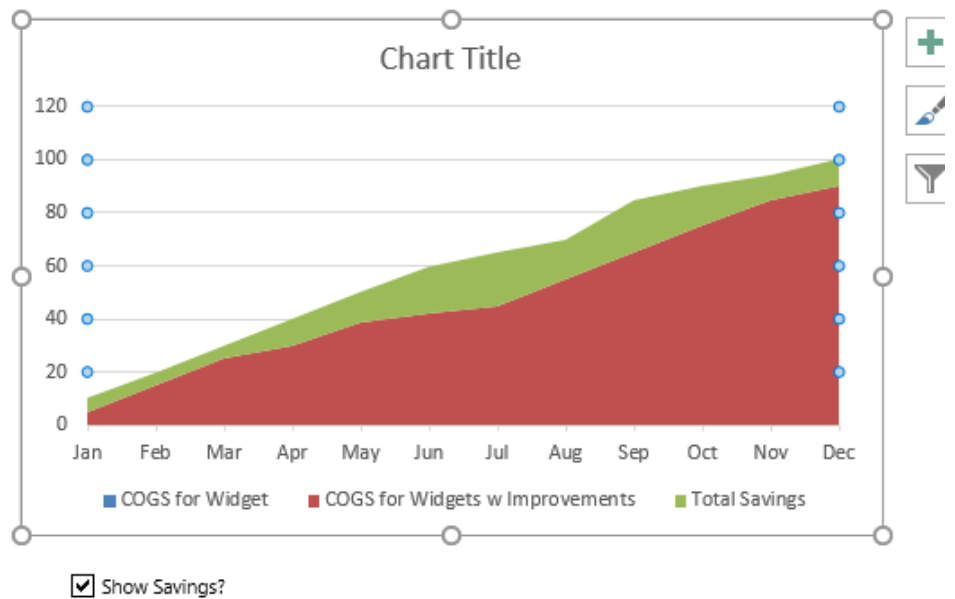
	A	B	C	D	E	F	G	H	I
1									
2		#	Month	COGS for Widget	COGS for Widgets w Improvements	Total Savings		Transformatic	
3		1	Jan	10	5	5		COGS for Widget	COGS for W Impro
4		2	Feb	20	15	5		0	
5		3	Mar	30	25	5		0	
6		4	Apr	40	30	10		0	
7		5	May	50					
8		6	Jun	60					
9		7	Jul	65					
10		8	Aug	70					
11		9	Sep	85					
12		10	Oct	90	75	15		0	
13		11	Nov	94	85	9		0	
14		12	Dec	100	90	10		0	



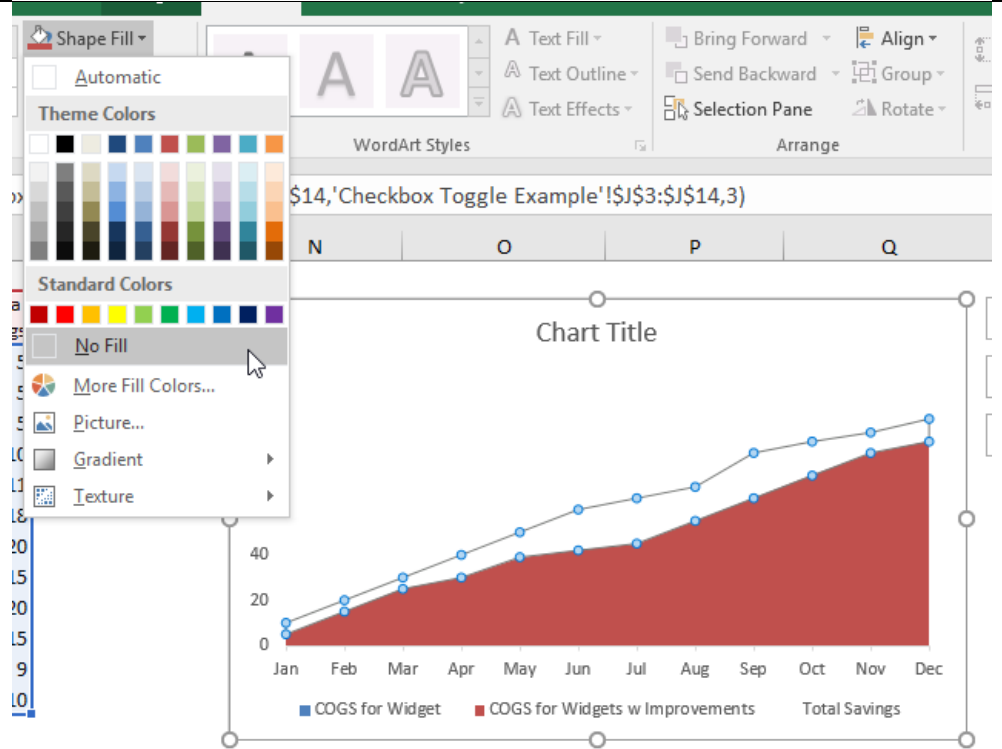
Click Steps

16. Select this Horizontal grid lines and press delete.

Screen Shots



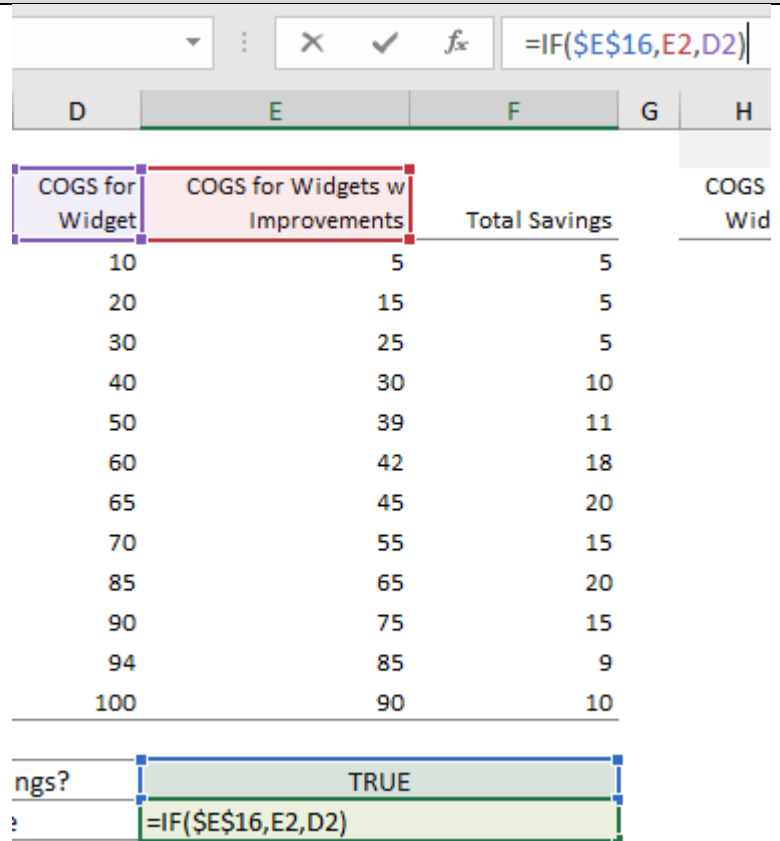
17. Select the top series. Go to the Format tab. Under Shape Fill, select No Fill.
18. With the series still select, go to Shape Outline and select a grayish outline.



Click Steps

19. In cell E17, type
=IF(\$E\$16, E2, D2).
Press ENTER.

Screen Shots



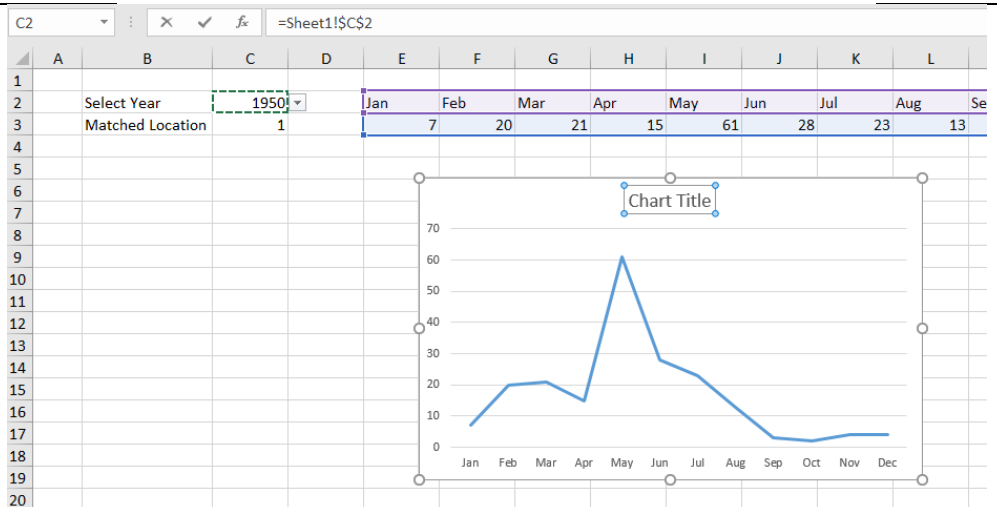
The screenshot shows an Excel spreadsheet with the following data:

COGS for Widget	COGS for Widgets w Improvements	Total Savings	COGS Wid
10	5	5	
20	15	5	
30	25	5	
40	30	10	
50	39	11	
60	42	18	
65	45	20	
70	55	15	
85	65	20	
90	75	15	
94	85	9	
100	90	10	

Below the table, there is a cell with the text "ngs?" and a cell with the text "TRUE". The formula bar shows the formula =IF(\$E\$16,E2,D2).

20. Click on the Chart Title (if you not have a Chart Title, you can add on in Excel 2013+ by selecting the chart and going to the Design tab; in Excel 2010, select the chart and add a chart title from the Layout tab).

21. Click into the formula bar. Type = and then select cell E17. Press Enter. (If you're having trouble, make sure to type equals



Click Steps	Screen Shots
before selecting a cell.)	
22. Press the Checkbox on and off to ensure everything is working correctly.6	