



User Guide

(Version 1)

For Microsoft® Excel® all versions 2007 – 2013 on Windows®

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Excel add-ins
and custom solutions

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Make Friends with Excel

In this document:

● This blue bullet means we're giving you tips or making (we think) helpful suggestions.

▶ This type of bullet is when we're saying something important!

The bits in normal font are also, potentially, worth reading.

Contents:

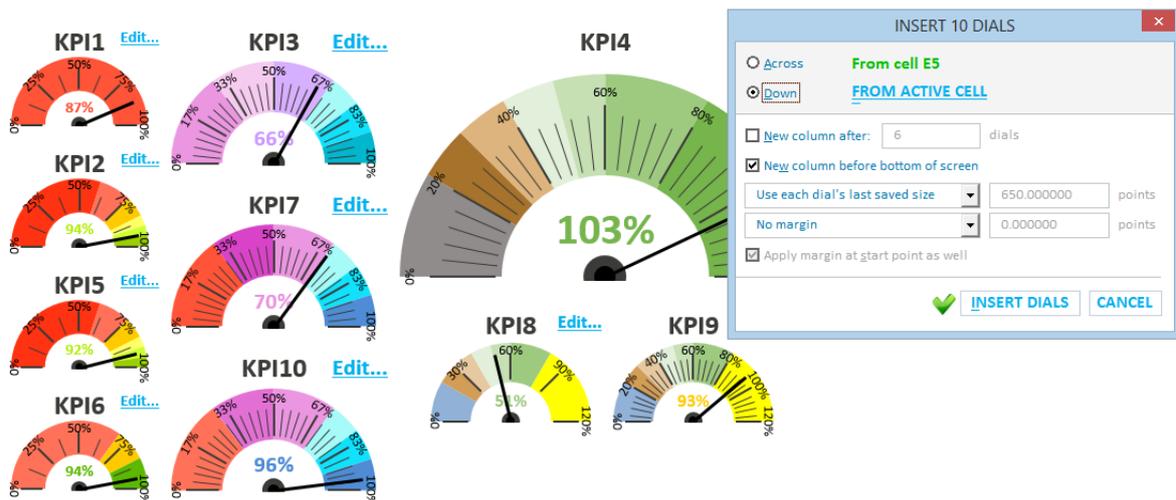
<u>Overview</u>	3
<u>Designing a dial</u>	4
<u>Refreshing and clearing dials</u>	7
<u>Managing dials</u>	8
<u>Style and design controls</u>	12
<u>DialCharts options</u>	13
<u>DialCharts print setup</u>	15
<u>Using normal shape functions with dials</u>	16
<u>Notes</u>	19
<u>Have your say or get in touch!</u>	20

DialCharts has made speedometer charts in Excel truly user friendly, and in a way that always performs. Just like normal Excel charts – one click to insert and start designing a dial. No copying, pasting, or building formulae – you just click, drag and design, and DialCharts will do all the unpleasant work. Instantly, every time.

Design each dial you need just once, and insert copies of any dial into any spreadsheet. It’s a good idea to give your dials titles so that you can identify them easily. (If you want to, you can enforce unique dial titles in the ‘OPTIONS’ menu from the DialCharts ribbon.)

Once you’ve designed a dial, copies of the same dial can be inserted in any spreadsheet, in any size or place on the sheet. You can drag to position and resize your dials, just like any other chart or shape on the sheet.

If you’ve upgraded DialCharts, you can even insert whole dashboards of dials all at once:



(See ‘Managing dials’, later, for more on inserting dials.)

We hope DialCharts helps you visualise your data differently, and that you find it easy and intuitive to use.

Please send us your feedback, good or bad! We value and appreciate all feedback.

Feedback@Edcel.co.uk (Please specify if we can publish your feedback.)

Find us online:

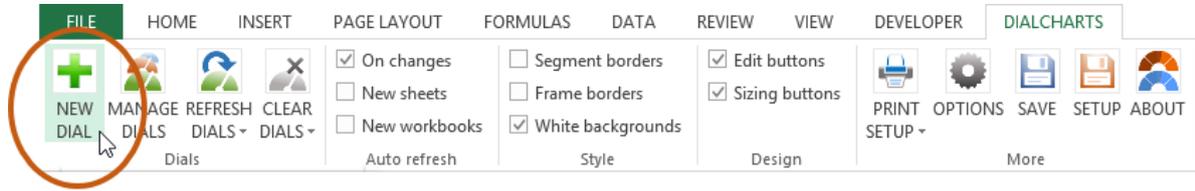
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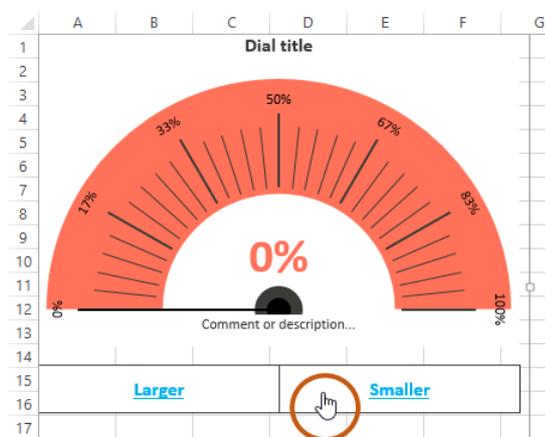
Designing a dial

[Next](#) | [Contents](#)

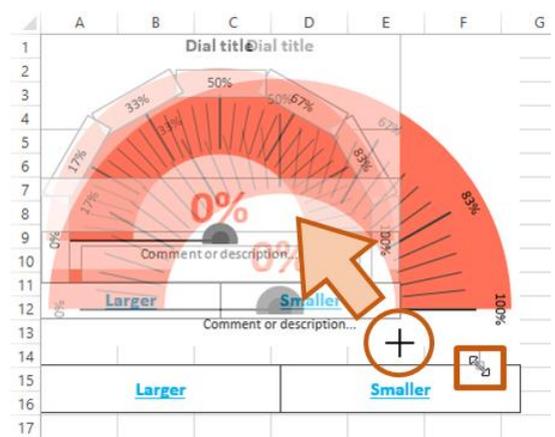
Click 'NEW DIAL' from the DialCharts ribbon:



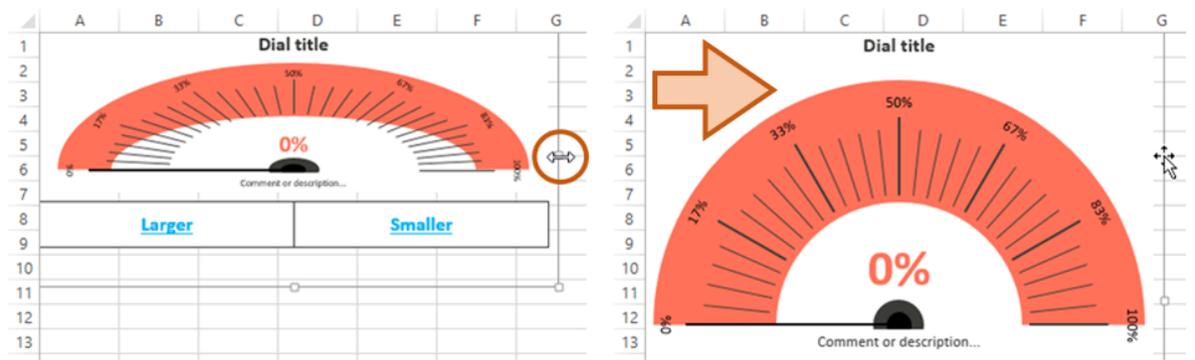
Click to snap the dial's size larger or smaller:



Or drag the dial's corners or edge points:

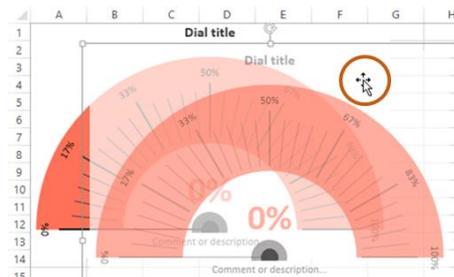


► When you resize a dial, DialCharts uses its WIDTH to measure how large to render it:



● After resizing, click the 'Larger'/'Smaller' buttons to render a dial again immediately.

To move the dial you're editing, click anywhere over the dial and drag:



Giving each dial a title makes it easier to manage your dials.

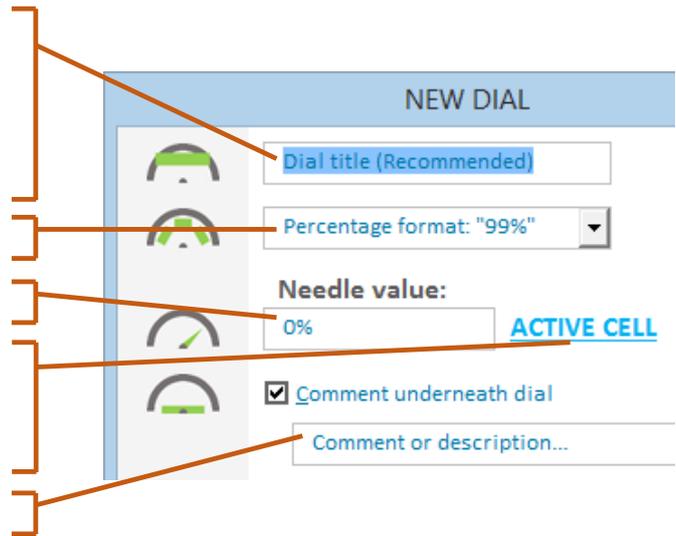
- You can enforce unique dial titles in 'OPTIONS', from the DialCharts ribbon.

Choose a number format for this dial.

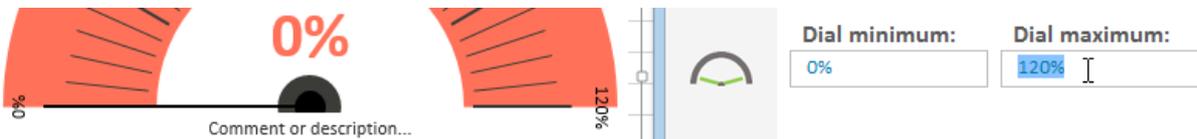
Enter the value currently represented.

Or, if you've upgraded DialCharts, select a cell in any spreadsheet and click 'ACTIVE CELL' to link your dial to that cell's value.

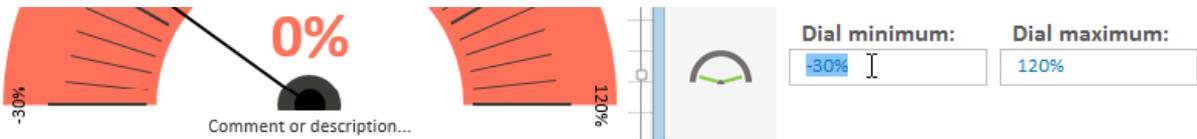
You can put a comment under each dial.



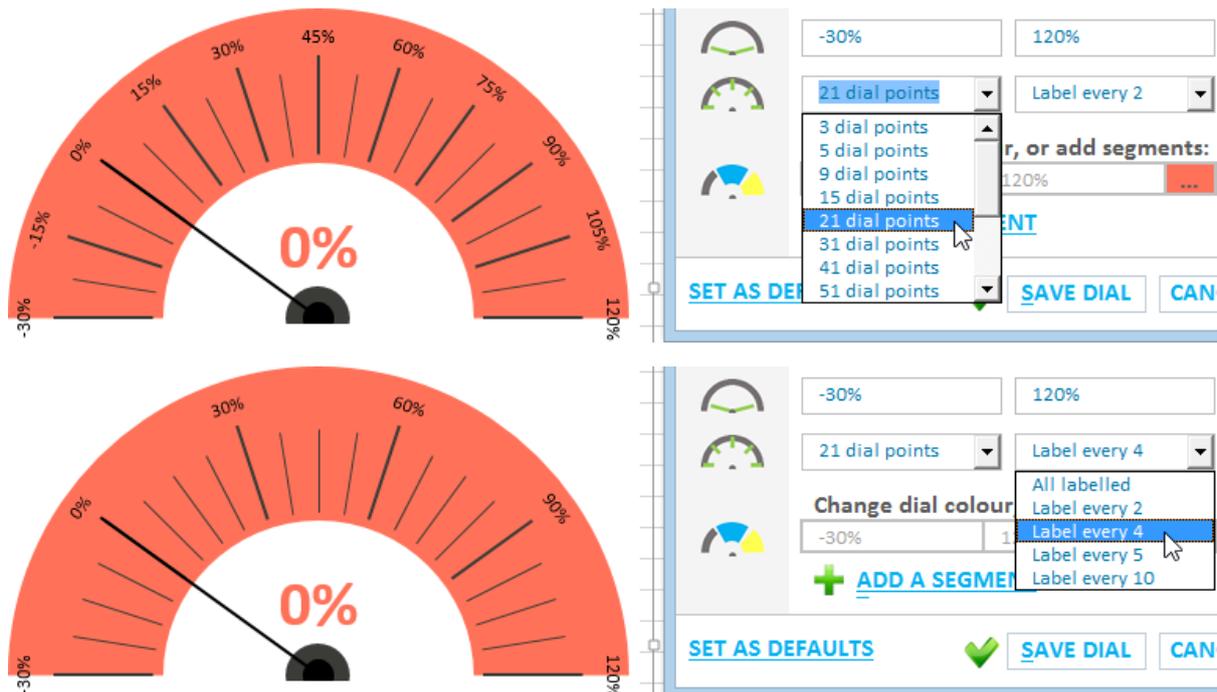
Choose the minimum and maximum values that can be represented in the dial:



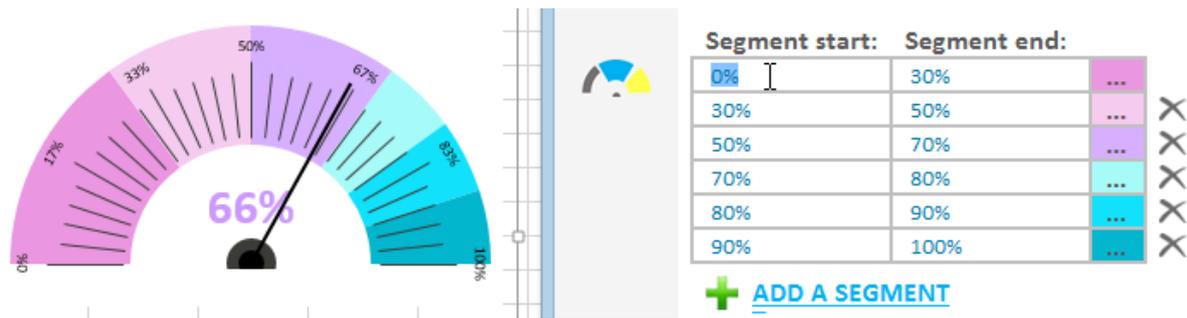
If you've upgraded DialCharts, these can be negative numbers:



Choose how many points to place round the dial, and how many of them to label:



You can change the colour of your dial, or add segments and change the colour of each one:

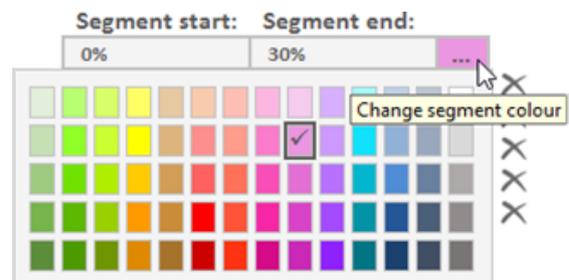


Click the delete icon to the right of any segment to remove it. When you add and remove segments, DialCharts doesn't re-render the dial until all the segment start and end values are also valid.

The first segment must start at the dial's minimum value, and the last must end at the dial's maximum. Each segment must start where the previous one ends. DialCharts will also check this for you when you try to save a dial.

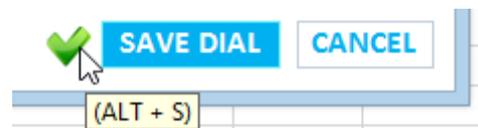
If you've upgraded DialCharts, you can build dials with up to 10 segments, and choose from 70 colours.

The DialCharts free trial comes with up to 3 dial segments, and a simpler palette.

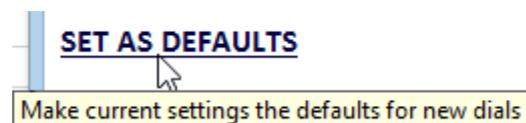


► Make sure you click 'SAVE DIAL' after creating or editing a dial!

Or, hold ALT + S in the dial menu.



Click 'SET AS DEFAULTS' to make all the current dial's settings the defaults for new dials (including all segments and colours):



● You can also duplicate any existing dial as the basis for a new dial, from 'MANAGE DIALS' in the DialCharts ribbon. See 'Managing dials', later, for more.

Refreshing and clearing dials

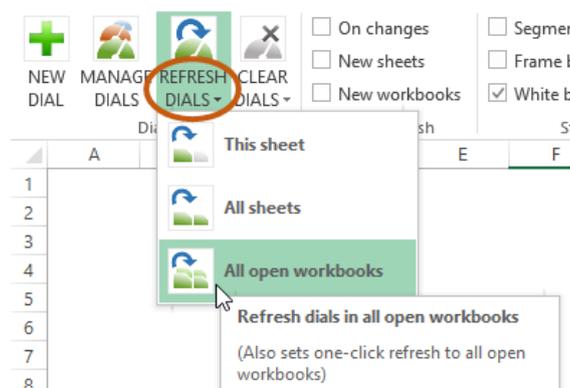
[Next](#) | [Contents](#)

If you've upgraded DialCharts, your dials can refresh automatically when you make changes in Excel. You can also auto refresh when you select a sheet, or open or activate a workbook:



If you have large numbers of dials, it may be easier to refresh when you decide to.

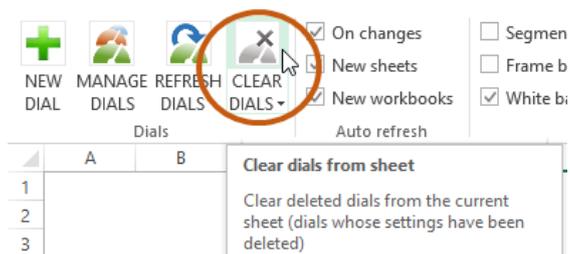
You can refresh all dials on the current sheet, in the current workbook, or in all open workbooks:



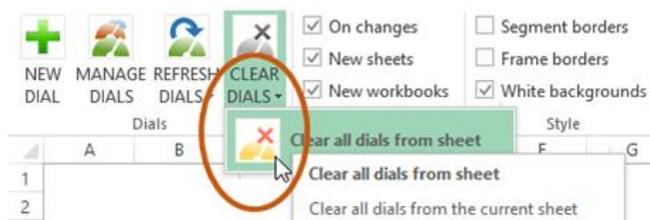
Clicking the main refresh button, as highlighted here, repeats the last type of refresh you ran in one click:



Click the main clear button to clear any dials on the current sheet whose settings have been deleted:



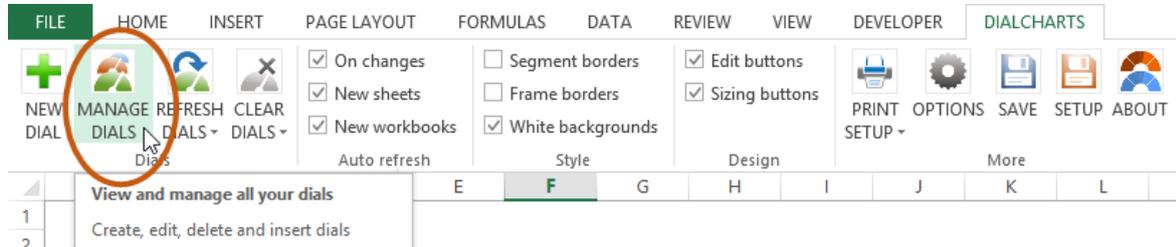
Drop down the second clear button to clear all dials from the current sheet:



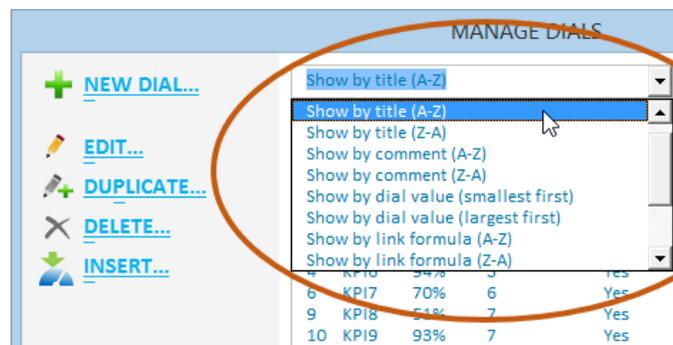
Managing dials

[Next](#) | [Contents](#)

Click 'MANAGE DIALS' from the DialCharts ribbon:

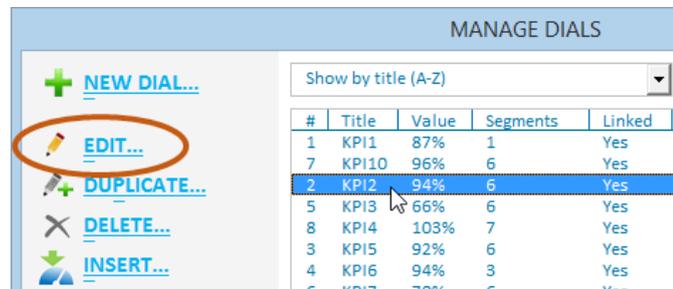


You can choose the order in which your dials are listed:



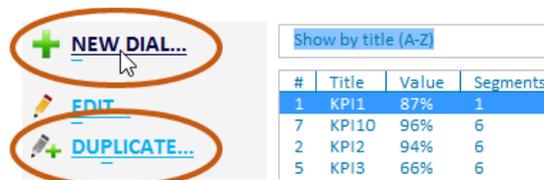
To edit a dial, double-click on it in the list.

Alternatively, click on a dial in the list to select it, then click 'EDIT...', or hold ALT + E:



To open and design a new dial, click 'NEW DIAL...':

Alternatively, select an existing dial in the list and click 'DUPLICATE...' (ALT + P) to open a new dial starting with the same settings:



To select several consecutive dials, you can drag down the list, or hold SHIFT as you click on the first dial, then the last:

#	Title	Value	Segments	Linked
1	KPI1	87%	1	Yes
7	KPI10	96%	6	Yes
2	KPI2	94%	6	Yes
5	KPI3	66%	6	Yes
8	KPI4	103%	7	Yes
3	KPI5	92%	6	Yes
4	KPI6	94%	3	Yes
6	KPI7	70%	6	Yes
9	KPI8	51%	7	Yes
10	KPI9	93%	7	Yes

To select multiple non-adjacent dials, hold CTRL as you click on dials to select them, or click on them again to de-select them:

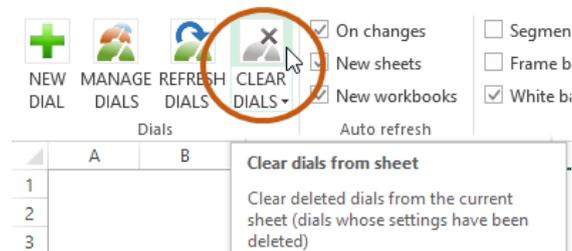
#	Title	Value	Segments	Linked
1	KPI1	87%	1	Yes
7	KPI10	96%	6	Yes
2	KPI2	94%	6	Yes
5	KPI3	66%	6	Yes
8	KPI4	103%	7	Yes
3	KPI5	92%	6	Yes
4	KPI6	94%	3	Yes
6	KPI7	70%	6	Yes
9	KPI8	51%	7	Yes
10	KPI9	93%	7	Yes

Click 'DELETE...', or hold ALT + D, to permanently delete the settings for the dial(s) selected:



- ▶ When you delete dials, DialCharts deletes the dials' settings, but does not automatically clear copies of the dials in your existing spreadsheets. Copies of deleted dials are left intact, but can no longer be edited or refreshed.

To clear copies of deleted dials, select a worksheet, then click the main 'CLEAR DIALS' button in the DialCharts ribbon:



If you've upgraded DialCharts, you can click 'INSERT...' to insert copies of any dial(s) selected in the list, into the current worksheet:

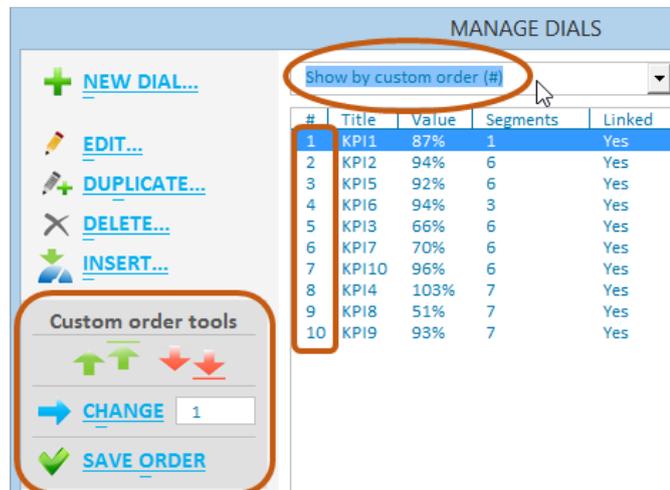


- If you're using the DialCharts free trial, you can insert one dial at a time, by editing it on the sheet where you want to insert it, then clicking 'SAVE DIAL' to keep a copy of the dial on that sheet.

When you click 'INSERT...', dials will be inserted in the order in which they're currently listed in the 'MANAGE DIALS' list. You can use 'custom order' to set an exact insert order:

In custom order, you can select dials, one or several at a time, to move them up, to the top, down or to the bottom.

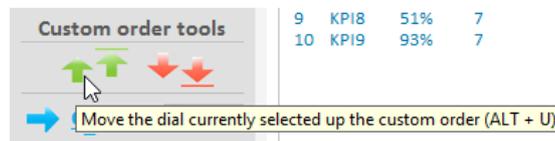
You can also see each dial's existing order number down the left-hand side.



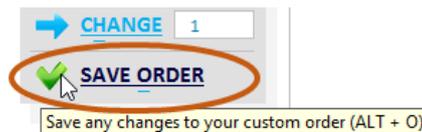
You can select a single dial to set its exact position in the custom order in one click:



- Moving dials up and down can be much quicker with the keyboard. Hover to see a button's shortcut, e.g. ALT + U to move dials up:



- ▶ You must click 'SAVE ORDER' (or hold ALT + O) if you want DialCharts to remember your new custom order in future:



When you insert dials, they will be inserted in whatever order they are currently listed in, whether that's by title, custom order, or any other order.

If you want to insert dials in a particular order just once, you can edit your custom order, insert your dials, then close the 'MANAGE DIALS' menu without saving your custom order.

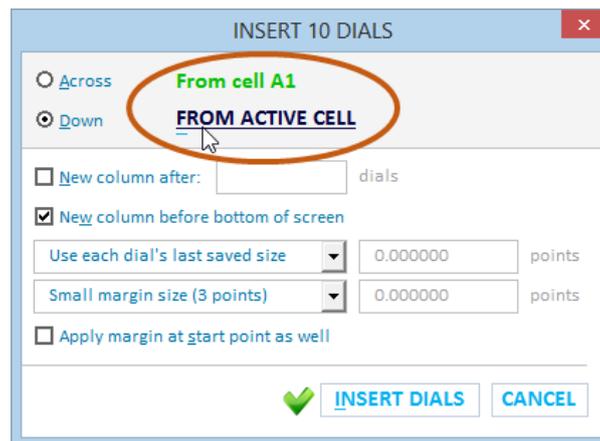
Select the dials you want to insert, then click 'INSERT...' (or hold ALT + I):



You can now choose whether to insert dials down, across, and from what cell.

By default, DialCharts will start inserting dials from the top-left of the active cell. To change the start cell, select any other cell and click 'FROM ACTIVE CELL'.

(You can move to other sheets and workbooks as well.)

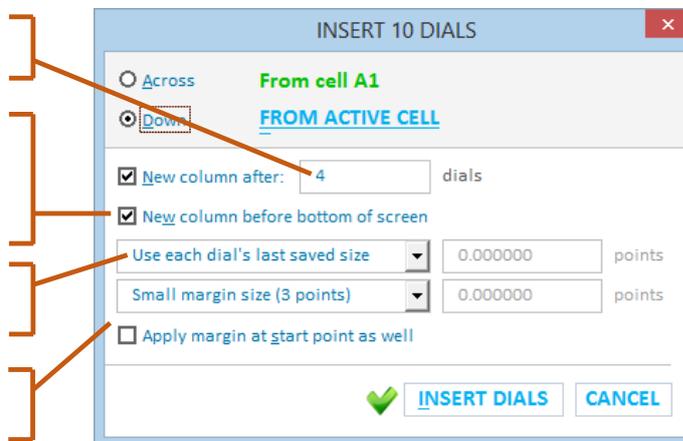


Enter any maximum number of dials to draw down or across.

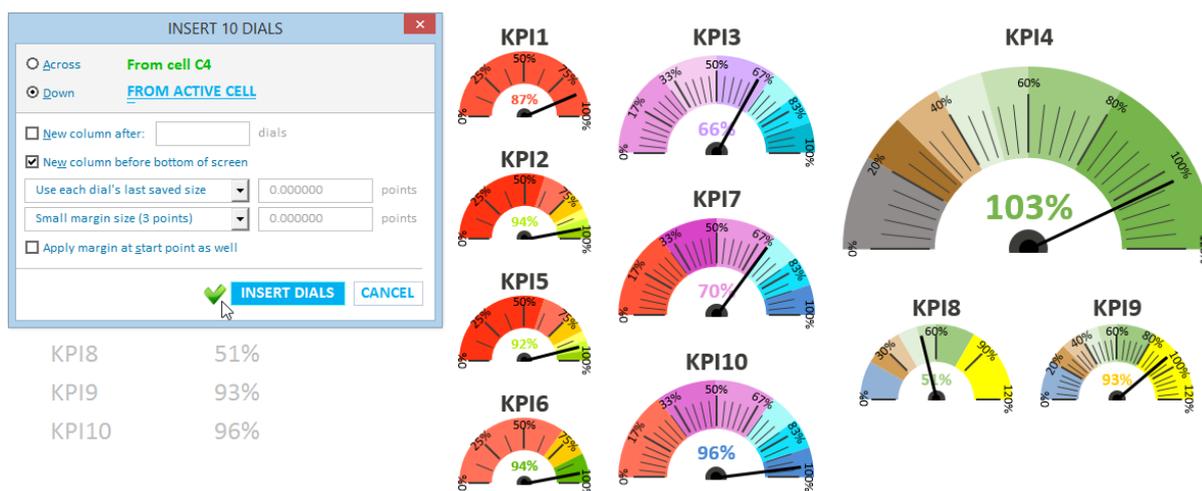
Select whether to stop before the edge of the screen (at the current zoom).

Insert dials at their last saved size, or specify another size.

Specify any margin between dials and at the start point.

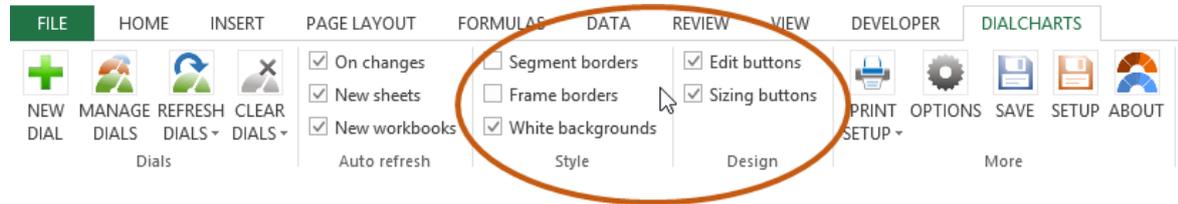


Click 'INSERT DIALS' and watch your dials build in seconds!

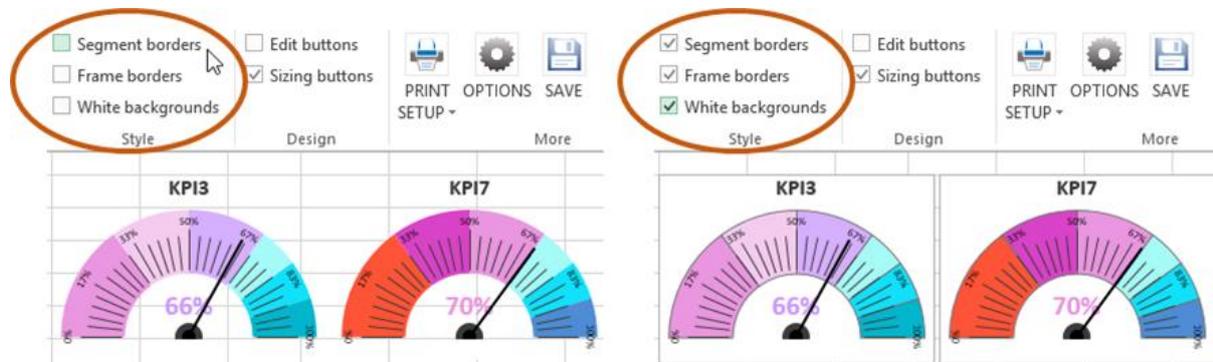


If the layout and sizing isn't quite what you wanted, just click 'INSERT...' again from the 'MANAGE DIALS' menu. If necessary, try different layouts, or build more than one on the same sheet – DialCharts can rebuild dozens of dials in just seconds, so you can experiment quickly and easily.

Use the 'Style' and 'Design' parts of the DialCharts ribbon to turn dial properties on or off:

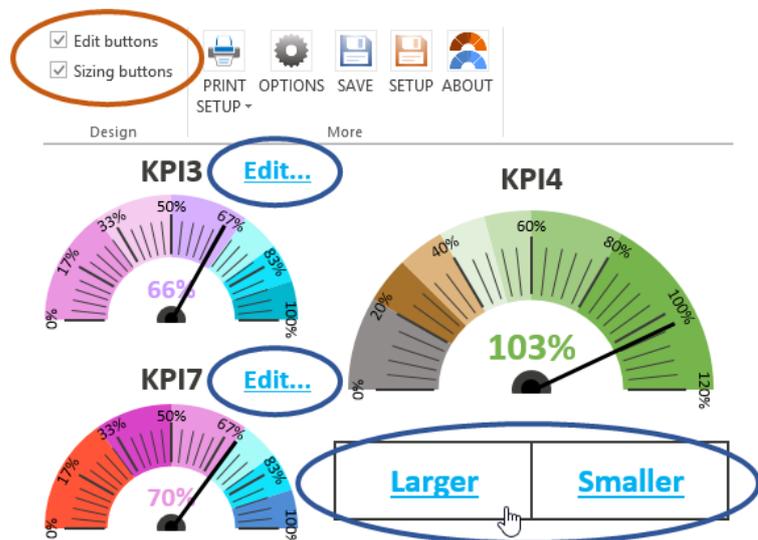


The 'Style' checkboxes turn on or off your dials' segment borders, a frame border round each dial, and a white background behind each dial:



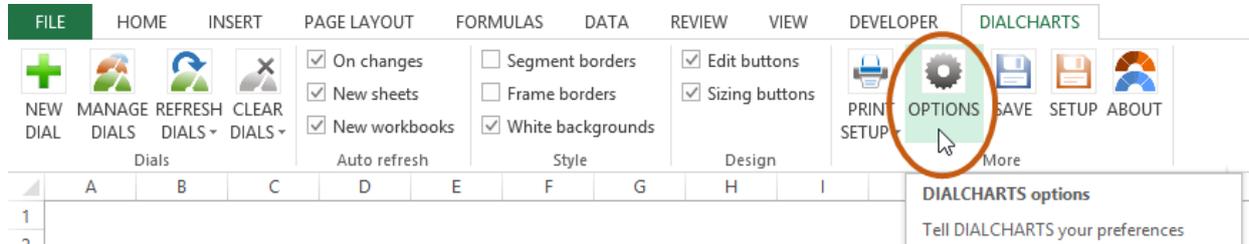
The 'Design' checkboxes show or hide the 'Edit...' button at the top-right of each dial, and the sizing buttons you see when you're editing a dial.

- Even when you uncheck 'Edit buttons', the buttons are actually still there, just not visible – you can still click near the top-right of a dial to edit it.



- ▶ When you print dials, you'll want to uncheck 'Edit buttons' in the DialCharts ribbon first.

Click 'OPTIONS' from the DialCharts ribbon:



You can enforce unique dial titles to help you manage them.

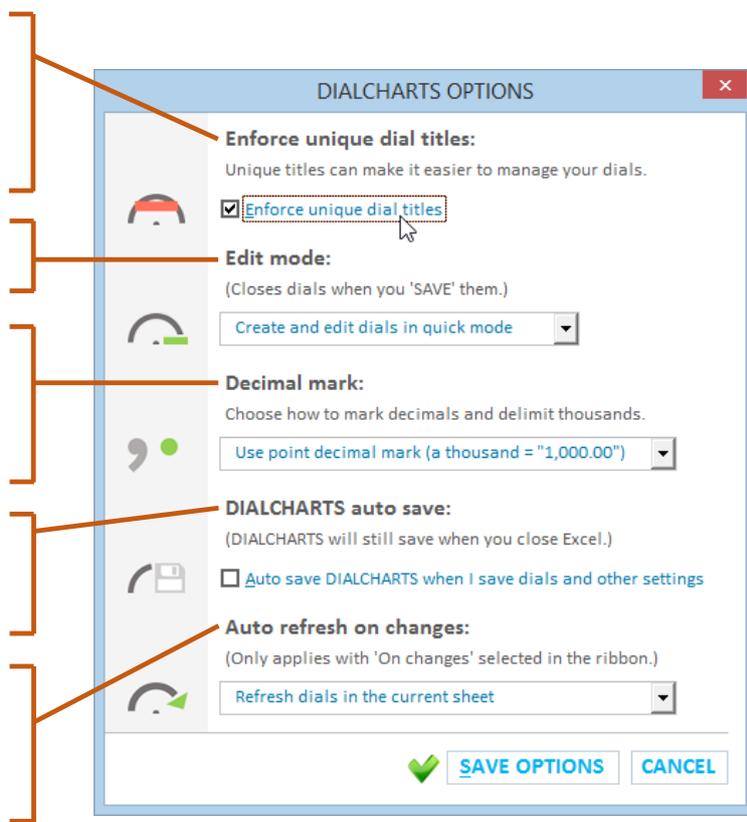
(Turning this on doesn't check existing dial titles.)

Choose whether a dial's menu closes as soon as you save it.

Choose a decimal mark (e.g. a thousand = "1,000.00" with a point, or "1.000,00" with a comma decimal mark).

You can set DialCharts to auto save its data every time you save a dial or other settings.

Refine auto refresh on changes (only applicable if you've upgraded DialCharts – see 'Refreshing and clearing dials').



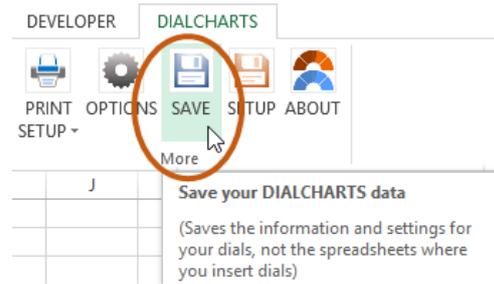
▶ Even with auto save on, DialCharts never saves your actual spreadsheets, where you insert dials – it only saves itself, with the information and settings for your dials.

▶ Don't forget to save your changes to DialCharts options! Or hold ALT + S:



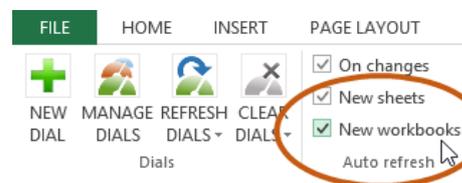
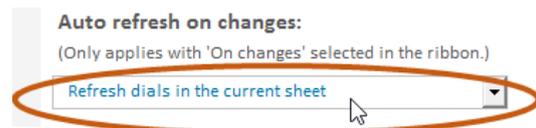
- Auto save is turned off by default, so you can work more quickly. DialCharts will still save itself when you actually close Excel.

If you work for a long time with auto save turned off, you can also click 'SAVE' at any time from the DialCharts ribbon:

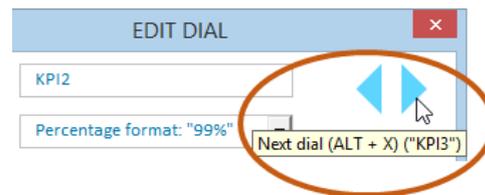


- If you like to work with auto refresh on changes, you can work more quickly by keeping this option to its default setting, 'Refresh dials in the current sheet':

You can also select the other auto refresh types ('New sheets' and 'New workbooks') so that your spreadsheets refresh and catch up as you move between them:



- Set your edit mode to browsing mode then open your dials from the 'MANAGE DIALS' menu, and you can browse them as you edit them and save changes to them:

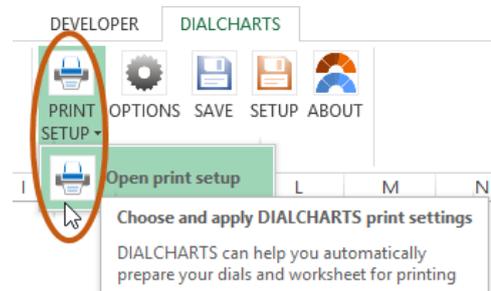


DialCharts print setup

[Next](#) | [Contents](#)

DialCharts can automatically find your dials and nearby cells on any sheet, and set that as the area for Excel to print.

To see the available options, drop down 'PRINT SETUP' in the DialCharts ribbon, and then click 'Open print setup':

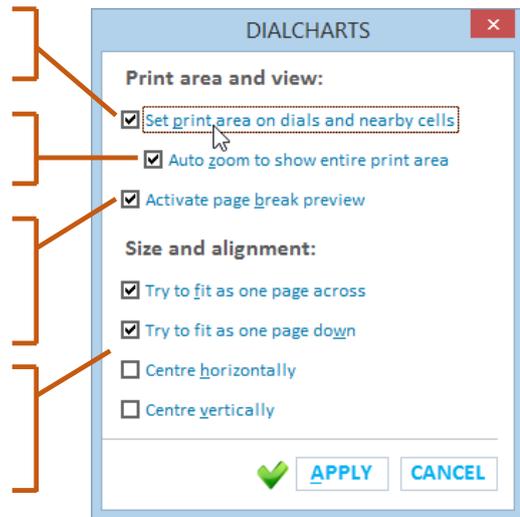


Finds your dials and nearby cells on the sheet, and sets the area to print accordingly.

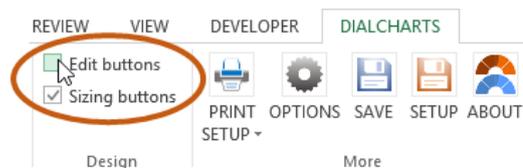
Zooms in or out, as required, to show you the whole print area on screen.

Page Break Preview is also available in the 'VIEW' tab in Excel's ribbon, and is useful for editing the boundaries of your print area and pages.

DialCharts print setup also groups other options for convenience which are also available from the 'PAGE LAYOUT' tab in Excel's ribbon.



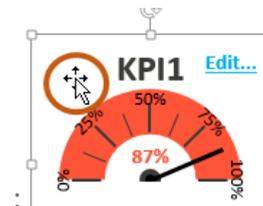
▶ When you print dials, you'll also want to UNCHECK 'Edit buttons' in the DialCharts ribbon, so that the buttons aren't printed:



● Even when you uncheck 'Edit buttons', the buttons are actually still there, just not visible – you can still click near the top-right of a dial to edit it.

DialCharts cooperates readily with Excel’s inbuilt features for moving, nudging, sizing and aligning shapes, with each dial behaving much like any other shape object on your sheet.

Click on a dial to select it (away from its top-right area, because that’s where the dial’s ‘Edit...’ button will be, whether or not it’s currently visible):



Hold CTRL and click on another dial, then another, to select multiple dials (and/or other shapes) at the same time:

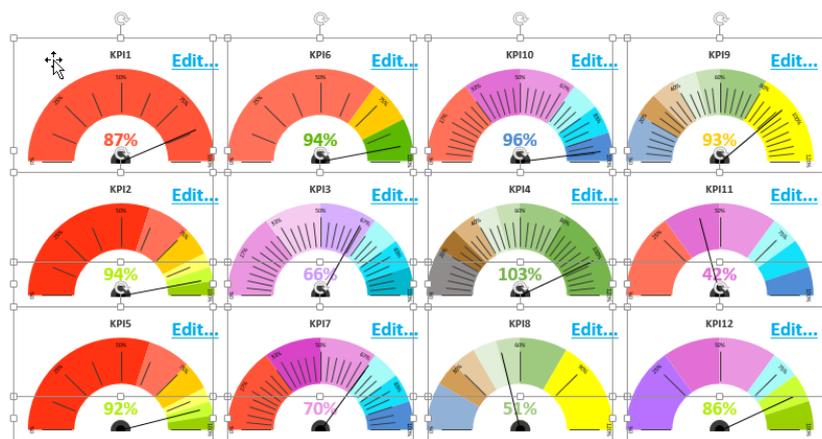
(Still holding CTRL, click on a dial or shape again to de-select it.)



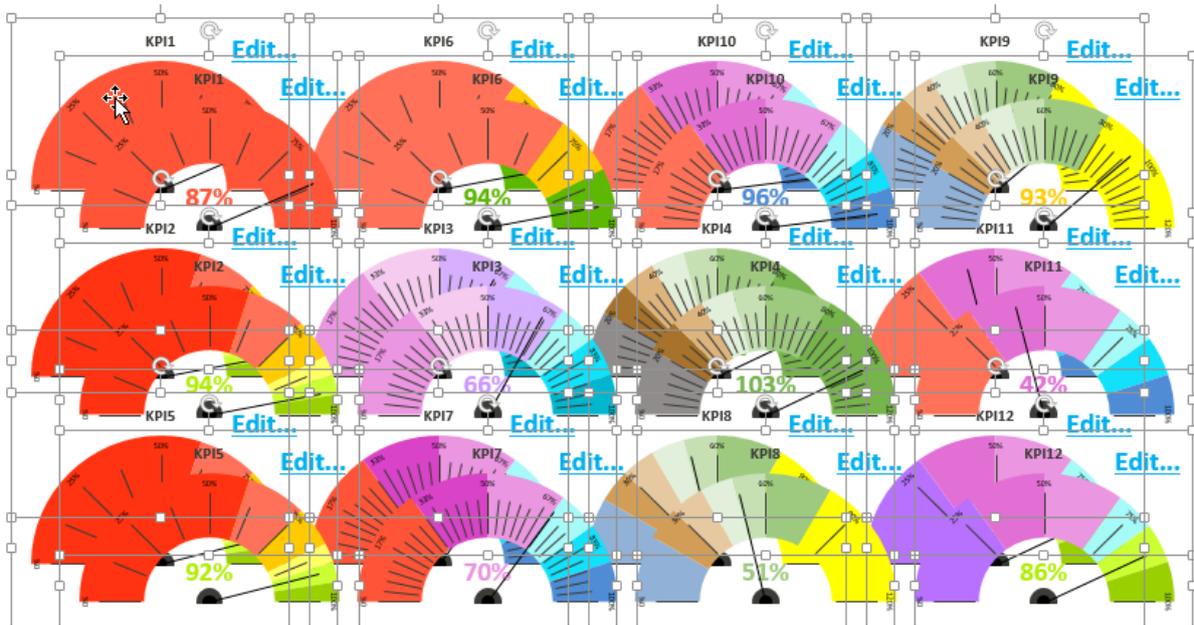
Press your keyboard’s arrow keys to nudge the selected dials and shapes up, down, left or right by tiny increments. Hold the arrow keys down to do this quickly in succession.

If at least one dial or shape on the sheet is selected, hold CTRL + A to select all shapes and dials on the sheet:

To select nearly all shapes, do the same, then hold CTRL and click again on those you don’t want.

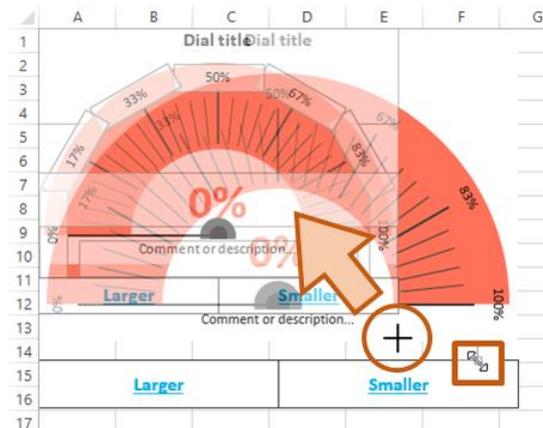


With one or more dials and shapes selected, you can drag to move the entire selection:

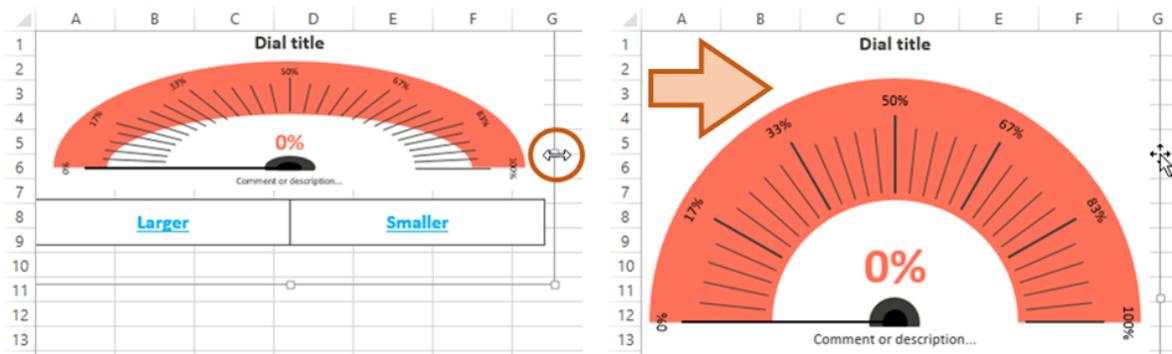


You can resize dials as you would normally resize shapes in Excel, by dragging their corner or edge points:

(You can do the same with multiple dials and shapes selected at the same time.)



► When you resize dials, DialCharts uses their WIDTH to measure how large to render them:



● Click 'REFRESH DIALS' from the DialCharts ribbon to re-render your dials at any time:

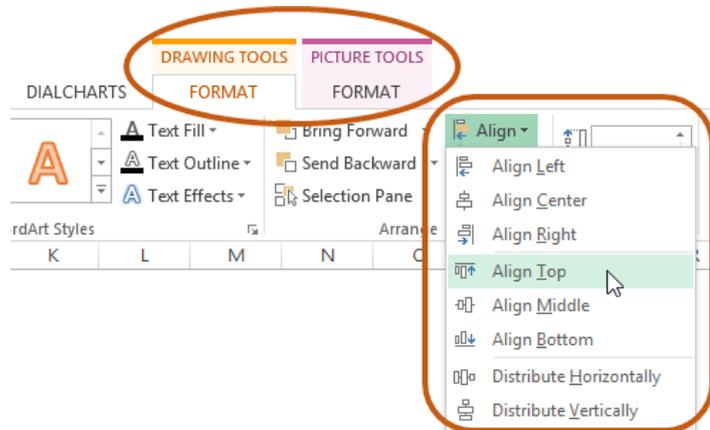


It can be useful to align and distribute your dials and other shapes, and you can use Excel's inbuilt features for doing this.

Select multiple dials or shapes by clicking on one, away from its top right, then holding CTRL as you click on more dials and shapes.

In Excel's ribbon, to the far-right, you should then see a tab called 'DRAWING TOOLS', and sometimes also 'PICTURE TOOLS'.

In either tab, near the right-hand end, drop down 'Align' and click on the alignment or distribution you need.



► In some versions of Excel, instead of the 'Align' drop down shown, the button is an icon with a drop down, in the same place near the right-hand end of the 'DRAWING TOOLS' tab.



● If you make a mistake in your alignments, just press CTRL + Z to undo.

Keyboard shortcuts in all DialCharts menus only work when the menu is selected, or active (e.g. holding ALT + S to save a dial). If you've clicked away from a DialCharts menu, in your worksheet or elsewhere, you'll need to click anywhere back on the menu to select it again before its keyboard shortcuts can work.

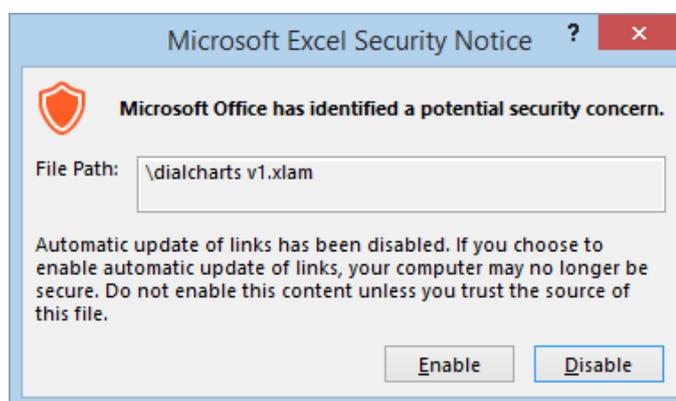
If you click to check or uncheck the checkboxes in the DialCharts ribbon, while you're editing a cell, DialCharts won't be able to register the change and apply the setting. If this happens, come out of the cell you're editing, and click the checkbox again twice to apply the setting you wanted.

DialCharts runs even faster if you work at 100% zoom. This shouldn't normally make any visible difference, but if you work with spreadsheets containing large numbers of dials, you can optimise performance by working at exactly 100% zoom.

If you've upgraded DialCharts, and you link your dials to cell values, you may have to enable external links when you open Excel. That's because DialCharts has to track each spreadsheet whose cell value(s) you've linked dials to, and Excel is verifying that you're happy to allow it to update from other spreadsheets.

Click 'Enable', or hold ALT + E (or the equivalent option, depending on your version of Excel):

You can also change your external content settings in Excel Options → Trust Center → Trust Center Settings → External Content.



If you link dials to cells, and then delete a spreadsheet file with a cell you've linked to, or move the file to a different folder on your computer or network, you could encounter Excel's external link error warnings when you open Excel.

You can either use Excel's inbuilt features to try to correct your links, or edit the relevant dials to clear their links or set them again.

Have your say or get in touch!

Contents

Please send us your feedback, good or bad! We value and appreciate all feedback.

Feedback@Edcel.co.uk (Please specify if we can publish your feedback.)

Find us online:

www.Edcel.co.uk



☹️ If you've had difficulties with DialCharts, we're sorry, and we're here to help. 😊

You can email us here:

Or call us, on 01904 236221.

Support@Edcel.co.uk

(If you're calling from outside the UK, dial +44 1904 236221.)