DR 15-0015 — DML: Stock charts and interoperability

Status: Further Consideration Required

Subject: DML: Stock charts and interoperability

Qualifier: Request for clarification

Submitter: Charlie Clark Organization: None

Contact Information: charlie@begeistert.org

Submitter’s Defect Number: none

Supporting Document(s): none

Date Circulated by Secretariat: 2015-10-01

Deadline for Response from Editor: 2015-12-01

IS 29500 Reference(s): 29500-2016: Part 1, §21.2.2.198, “stockChart (Stock Charts)”, p. 3429

Related DR(s): none

Nature of the Defect:

I actually think this is a bug in Excel, but at least the narrative part of the specification could do with a note.

I'm enclosing an SML file with a sample stock chart. This chart should display hiLoLines but doesn't until the data series actually contain numCache elements. Worse still: if you inspect the series and check the options the setting is missing and the node will be removed when the file is saved.



I think this is a bug in Excel because numCache or strCache elements are optional, so that charts can be created independently of the data. But what's the best way to handle this? The implementer's notes don't mention anything. Is there any way to work around this safely?

In addition: maybe the descriptions for the options hiLoLines, upDownBars and dropLines could be extended a little to cover defaults? hiLoLines actually feels like it should be a boolean attribute, but I haven't tried playing with the shape properties.

Solution Proposed by the Submitter:

None

Schema Change(s) Needed:

No

**Editor’s Response:**

**2016-09-23 Rex Jaeschke:**

From MS experts:

The issue here is that the high/low lines on the Stock chart are missing. The core issue in the Stock Chart XML that was attached was because the hiLowLines element was missing as a child of the stockChart element. High low lines in Stock Chart can be manually enabled/disabled through Office UI (although, granted it doesn’t make much sense to disable them in a stock chart). What happened was that the element defining the presence of high low lines for the attached XML was missing, and hence high low lines did not show up. By adding the hiLowLines element to the XML as a child of stockChart, with appropriate definition of its line formatting to ensure visibility, the high low lines will show up. To give the user an idea of what the XML should look like, please do the following:

1. In the original Excel workbook submitted, select the Stock Chart and go to Chart Tools -> Design.
2. Go to “Add Chart Element”->”Lines”->”High-Low Lines”.
3. High low lines will now appear. Save and review the XML.

Does this resolve the issue?

**2016-09-26/29 Seoul F2F Meeting:**

We have an initial response, which will be sent to the submitter.

**2016-09-26 Charlie Clark:**

Again, we're hitting the interoperability barrier here. If hi-lo bars are required for the chart to work then this \*must\* be reflected in the specification, preferably in the schema but at the very least in the narrative part. Otherwise, we'll all go back to reverse-engineering what Excel produces, which is the antithesis of the specification. I'll drop a similar note to Aarti.

Suggested change to schema

<xsd:complexType name="CT\_StockChart">

<xsd:sequence>

<xsd:element name="ser" type="CT\_LineSer" minOccurs="3"

maxOccurs="4"/>

<xsd:element name="dLbls" type="CT\_DLbls" minOccurs="0"

maxOccurs="1"/>

<xsd:element name="dropLines" type="CT\_ChartLines" minOccurs="0"

maxOccurs="1"/>

<xsd:element name="hiLowLines" type="CT\_ChartLines" minOccurs="0"

maxOccurs="1"/>

<xsd:element name="upDownBars" type="CT\_UpDownBars" minOccurs="0"

maxOccurs="1"/>

<xsd:element name="axId" type="CT\_UnsignedInt" minOccurs="2"

maxOccurs="2"/>

<xsd:element name="extLst" type="CT\_ExtensionList" minOccurs="0"

maxOccurs="1"/>

</xsd:sequence>

</xsd:complexType>

@@ -3,9 +3,9 @@

<xsd:element name="ser" type="CT\_LineSer" minOccurs="3"

maxOccurs="4"/>

<xsd:element name="dLbls" type="CT\_DLbls" minOccurs="0"

maxOccurs="1"/>

<xsd:element name="dropLines" type="CT\_ChartLines" minOccurs="0"

maxOccurs="1"/>

- <xsd:element name="hiLowLines" type="CT\_ChartLines" minOccurs="0"

maxOccurs="1"/>

+ <xsd:element name="hiLowLines" type="CT\_ChartLines" minOccurs="1"

maxOccurs="1"/>

<xsd:element name="upDownBars" type="CT\_UpDownBars" minOccurs="0"

maxOccurs="1"/>

<xsd:element name="axId" type="CT\_UnsignedInt" minOccurs="2"

maxOccurs="2"/>

<xsd:element name="extLst" type="CT\_ExtensionList" minOccurs="0"

maxOccurs="1"/>

</xsd:sequence>

-</xsd:complexType>

+</xsd:complexType>

This should be double-checked to see whether other elements are also effectively also required.

**2016-11-02 Rex Jaeschke:**

From MS experts:

High-low lines are not a requirement for stock charts to function. We do allow users to disable high-low lines through Office client UI, which allows users to preserve just the “close” portion of the data. We believe that users should have this level of customization if they so choose, and hence we maintain that high-low lines should be an optional rather than required component of stock charts. Setting high-low lines to required would force high-low lines to be an innate part of stock charts, which may be against what our users desire.

Please let us know if this clarifies your question.

**2016-11-04 Charlie Clark:**

This directly contradicts the advice earlier in the discussion:

High low lines in Stock Chart can be manually enabled/disabled through Office UI (although, granted it doesn’t make much sense to disable them in a stock chart).

And, again, this is a question about the specification and what is needed to create a stock chart. If the specification is to stay as is then you have a broken implementation in MS Excel.

**2016-12-06 Rex Jaeschke:**

From MS experts: Although it does not make sense to disable [high low lines] in a stock chart , we nevertheless allow users to do so through the Office UI and hence necessarily denote high low lines as optional. The specification follows our feature design.

Rex: Is the spec broken/can it be improved, or is this an implementation-specific issue?

Changes to Part 1: N Part 2: N Part 3: N Part 4: N