EXCEL ‹‹‹‹‹‹

By Bill Jelen

Charting Improvements in Excel 2013

Companies with volume licensing agreements will be able to download Excel 2013 starting this month. Here is a look at the charting improvements in Excel 2013.

Insert Recommended Chart

One of the toughest problems when creating a chart is choosing the chart type.

Too many people try to use pie charts when pie charts should only be used to show how components add up to 100%. Line? Surface? And when do you use Scatter charts?

The Excel team simplified this process in Excel 2013. Select your data. On the Insert tab, choose the Recommended Charts icon. Excel will offer up to 10

charting thumbnails in descending order. In this article, I am plotting 12 months of revenue and gross profit. I normally would use a clustered column chart. Excel 2013 suggests a line chart first, which I rarely would have considered, but my preferred clustered column chart is second, so it's easy to select. I can also peruse the stacked area chart, stacked column, and 100% stacked columns before selecting a thumbnail and creating the chart.

Excel 2013 has a lot of tools to protect Excel novices from themselves. If you select an unsummarized data set of hundreds of points, Excel will look for a text column that has repeating values, such as a Region field or Product field. The Recommended Charts algorithm will offer to create a summary of sales by Profit or by Region. This requires a pivot table, but all of that happens in the background.

No Legends for Single-Series Charts

Any time that you create a chart from one data series, Excel 2010 would put the name of the data series in the chart title and in the legend. It was always

Figure 1

Figure 2

Figure 3

redundant, and you ended up deleting the title or the legend. In Excel 2013, you won't get a legend for a single-series chart.

Number Formats Match Source

Numbers that appear in data labels and along the axis will use the same number format as the cells in the source data. The format of the data used to create the charts in Figure 1 was $#,##0,K. This shows the values in thousands. As the figure shows, this format carried over to the charts.

Three New Helper Icons

Select a chart in Excel 2013, and three icons appear to the right of the chart (see Figure 1): a plus sign, paintbrush, and funnel.

The plus sign allows you to add elements to the chart, such as titles, data labels, or a legend. This one icon replaces the entire Chart Tools Layout ribbon tab from Excel 2010. It can turn elements on or off. Click the arrowhead to see a flyout menu of choices, or click More to open a new Format task pane with all of the choices.
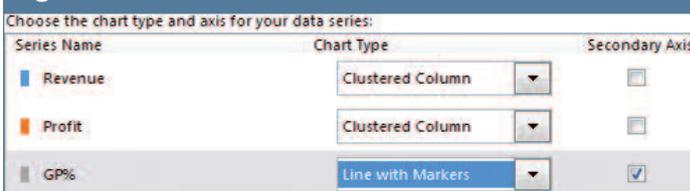
The paintbrush icon is my favorite. Microsoft hired a professional designer to create 153 really good-looking chart styles. When you click on the paintbrush, you will see about 10 ideas of how to format your chart. The designs are modern and generally look good. All of these styles were possible in Excel 2010, they just would have required 30 or 40 formatting steps instead of two clicks.

The funnel icon is again there to protect the Excel novice. Imagine that the original data had summary columns for Q1, Q2, Q3, Q4, and Total. These columns don't belong in the chart. The funnel icon lets you uncheck the unnecessary columns to remove them from the chart. This is a time saver. If you normally would create a second chartable table of the data, you won't have to do that anymore.

Data Label Callouts from Cell Values

Chart labeling is improved in Excel 2013 with a new callout label style and the ability to get chart label values from cells. The chart in Figure 2 has two callouts that came from text entered in row 3. Rather than static text, you could have

a formula to generate the label, such as =IF(MAX($B$2:$M$2)=B2,"Top Month",""), in order to dynamically label whichever month is the max.

Easier Combo Charts

The old Chart Wizard in Excel 2003 offered a combo chart where some series were shown as columns and others as lines, often using a secondary axis. This feature was hidden in Excel 2007 and 2010, although it was still possible using the Format Dialog. In Excel 2013, choose Insert, Recommended Charts, All Charts, Combo to get to a new way to specify exactly which series gets which chart type and which should be plotted on a secondary axis (see Figure 3).

Excel 2013 is available for volume licensing customers this month and will be available for purchase in Q1. Among the many improvements throughout this new version, these charting improvements will go a long way to modernize the look of your Excel reports. **SF**

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