



Excel Charting Tips: Part One

By Nate Moore, CPA, MBA, CMPE

Excel 2013 introduced a new interface for building charts. Some of the changes moved existing options closer to the chart to make customizing charts easier. Other changes added new filtering abilities that make charts more flexible. This article is the first in a series of articles that will introduce the three icons Microsoft added to Excel charts and offer ideas on how to take advantage of the new charting features.

Three New Chart Tools Icons

Figure 1 shows the three new chart tools icons (circled in red to the right of the chart) that give users quick and easy access to customize a chart. The plus icon opens a chart elements menu that provides tools to change chart titles, axes, data labels, legends, and more. The paintbrush icon opens a menu with two sections, one to adjust the chart style and the other to adjust the chart color. The filter icon opens a menu that provides new options to quickly filter the chart without having to adjust the underlying chart data.

Chart Elements

The plus icon opens the chart elements menu next to the chart, as shown in Figure 2. Notice the check boxes show chart elements that are active in the current chart. For example, the Chart Title box is checked because the chart currently has a title, but the Axis Titles box is unchecked since the chart does not have titles for either the X or Y axis. Simply check a box to add a chart element to your chart. Hover to the right of one of the options in the chart elements menu and a right-pointing triangle will appear. Click the triangle to open a new menu. In Figure 3, I have hovered over the Legend area, clicked the triangle, and now have options to change the location of the chart legend.

In Figure 4, I chose More Options... from the bottom of the menu in Figure 3. This opens a new panel on the right side of screen. This panel is context sensitive depending on the

chart element I selected. Notice in the panel in Figure 4 the options relate to the placement of the legend, since I clicked the triangle next to Legend in the menu in Figure 3. Had I selected options for Axis Titles, the panel's options would relate to the location and characteristics of axis titles in my chart.

Panel Submenus

Also notice that the panel in Figure 4 contains submenus. The paint bucket icon gives options for fill and border, which are accessible by clicking the triangles next to the words Fill and Border, as shown in Figure 5. You can see that I have expanded the options for Fill by clicking on that triangle. The border options are collapsed until I click on that triangle.

The pentagon-shaped icon in the middle of the three icons opens a submenu that contains options for shadow, glow, and soft edges. The glow and soft edges options are expanded in Figure 6. To be honest, I am not sure I have ever used any of these options in creating a chart, but they are there if you need them. The icon that is shaped like a column chart brings up the main set of options shown in Figure 4.

There is also another set of submenus available by clicking Text Options, as shown in Figure 7. The default option shown in Figure 7 is found by clicking the solid A icon. The outline A icon brings up a different set of options, as shown in Figure 8. Like the earlier example, some of the options are expanded in my example (glow and soft edges), while other options are collapsed (shadow, reflection, and 3-D format). Toggling the options to collapse and expand is as easy as clicking the respective triangle. Finally, the icon that has an A and what looks like lines of text brings up the submenu shown in Figure 9. Since I clicked on More Options from the Legend menu, these text-related options all relate to the way the text in my chart legend is shown. Remember that each option in the original Chart Elements menu has different options, so be sure to choose More Options... for the specific element you want to change in the chart.

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FIGURE 1

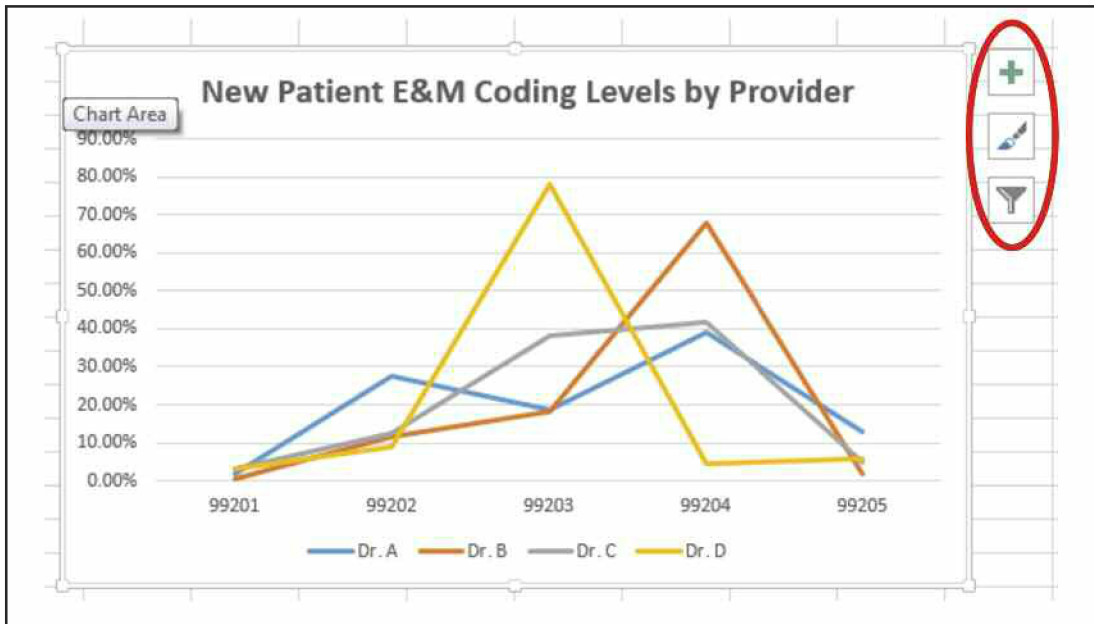


FIGURE 2

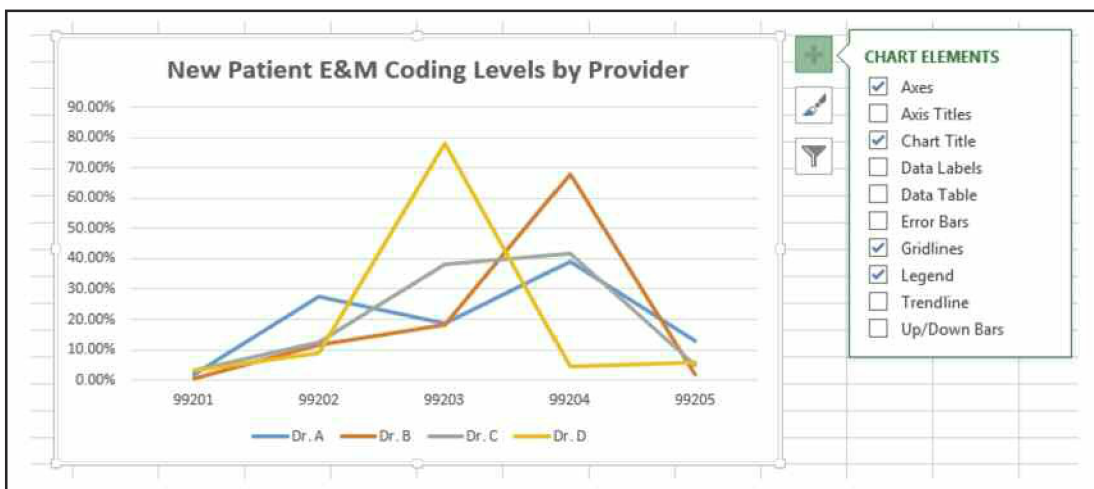


FIGURE 3



FIGURE 4

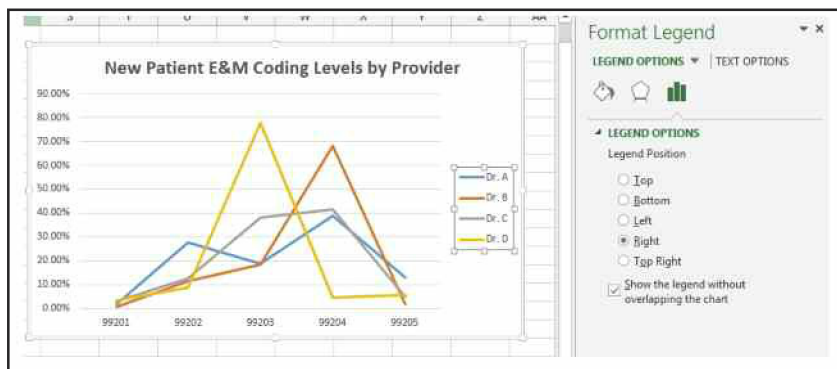


FIGURE 7



FIGURE 5

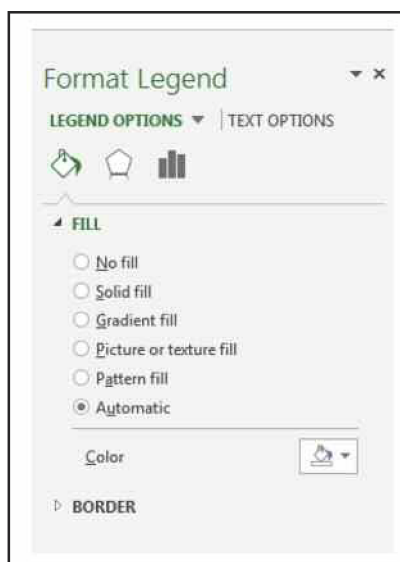


FIGURE 6



FIGURE 8



More to Come

This article briefly reviewed the chart elements menus and the submenus available to customize your chart. Some of these options, especially formatting related options, are available from the ribbon under Chart Tools and Format. Other options are only available through the new icon, so it's important to be familiar with navigating the chart elements menu.

In the next *Billing* article I will continue our discussion of new chart tools, focusing on the paintbrush and filter icons. ■

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FIGURE 9

