Excel 2013 Charting Tips: Part Two

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This article continues the January/February 2016 issue's introduction to Excel 2013 chart tools. In part one we discussed the new interface for building charts, focusing on the Chart Elements tool (a plus-sign icon). This article covers the paintbrush icon that controls Chart Styles and the filter icon that controls Chart Filters. These icons appear when a chart is created using the Charts section of the Insert tab on the ribbon. You can see a sample chart with the new icons circled in red to the right of the chart in Figure 1.

Chart Styles Using the Paintbrush Icon

Figure 2 shows the Chart Styles menu that appears when the paintbrush icon is selected. Note that there are two submenus at the top of the Chart Styles menu, Style and Color. The Style tab is a chart-specific list of styles that you can instantly apply to your chart. As you scroll through the options, you may see styles that use Excel charting options like legends, data labels, gridlines, background colors, and more. Especially if you're new to charting in Excel, Chart Styles is a great way to get ideas on how your data might be presented. Note that you can hover over Chart Styles and Excel will instantly and temporarily change your chart so you can easily see what your data will look like if you select and apply the style. Also note that once the Chart Style is applied, you can still apply charting tools to tweak the chart to get exactly the style you need.

The Color tab gives you instant access to different color palettes to change the colors in your chart. Figure 3 shows an example of the Color tab in action. If you are familiar with
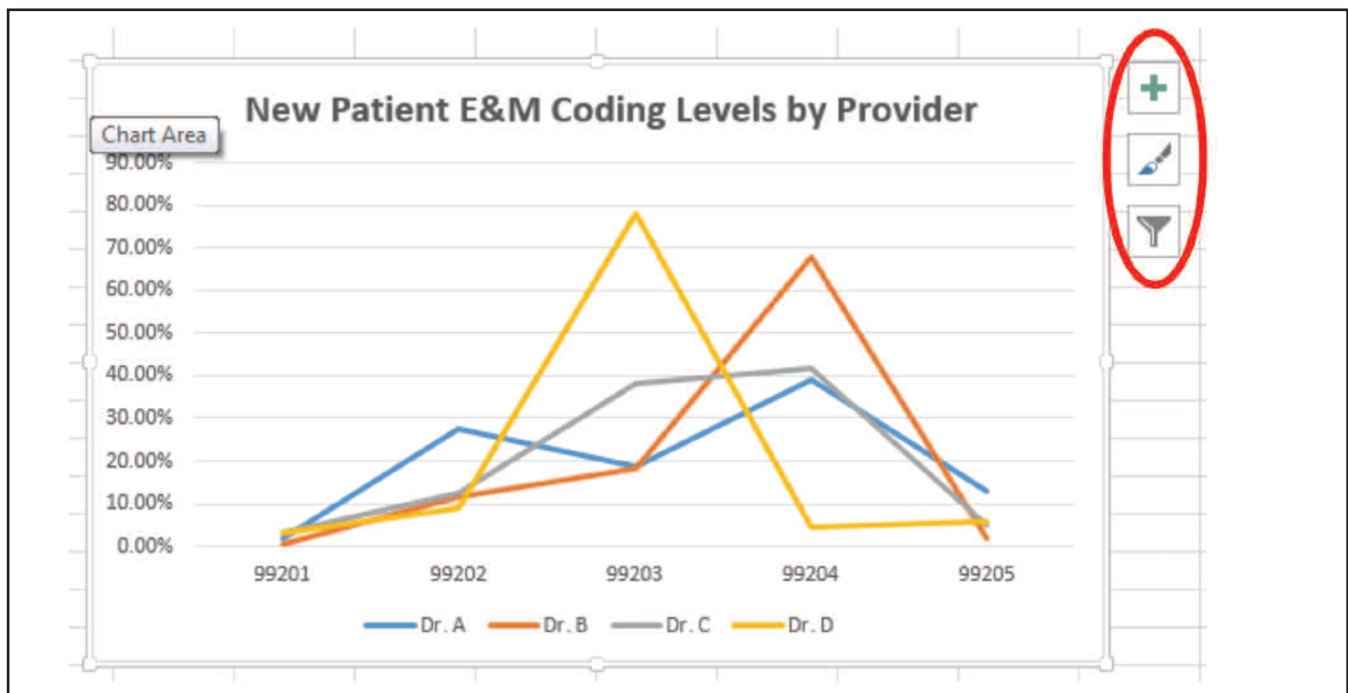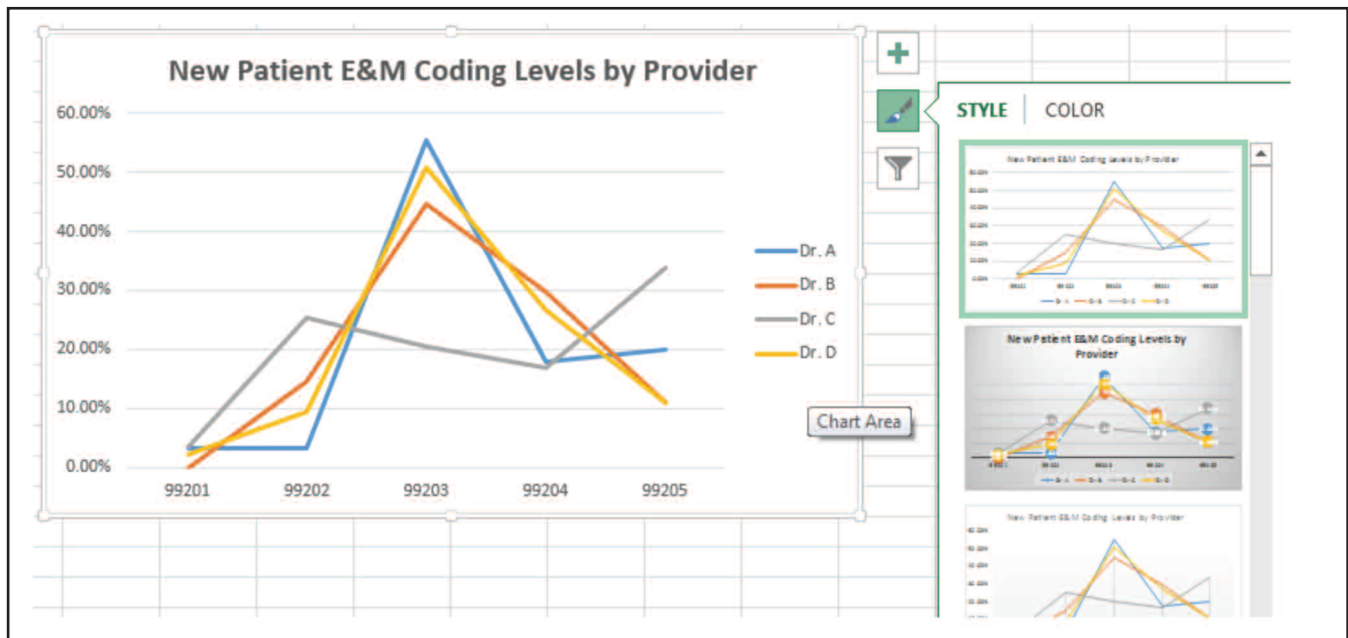
FIGURE 2

Themes in the Page Layout tab of the ribbon, the color palettes will look familiar to you. Just like the Styles tab, you can hover over a color scheme to see the changes temporarily reflected in your chart. To change the colors available, go to the Page Layout tab in the ribbon and change the theme colors.

Chart Filters Using the Filter Icon

Many of the options under the Chart Elements and Chart Styles options simply moved existing options from the ribbon closer to the chart. For me, the Chart Filters icon is the most useful change because it adds functionality that was harder to achieve before Excel 2013. If you had a PivotChart (a Pivot Table connected to a chart), it was easy to filter the chart by filtering the Pivot Table. Without a Pivot Table, it was difficult to filter data in a chart without completely changing the underlying source of data.

For example, look at the chart in Figure 4. Excel has captured the four doctors in the chart in the Series section and the five E&M codes under the Categories section. If you wanted to only compare Dr. A to Dr. C and you wanted to exclude 99201 codes, it's easy to check and uncheck boxes to filter the chart exactly the way you want. Equally important, you can quickly check and uncheck boxes to add Dr. B to the chart or to include 99201 codes without having to leave the chart or change the underlying data in any way.

Notice in Figure 4 that there are two tabs, Values and Names, in the Chart Filters window. Figure 4 highlights the Values tab. Figure 5 displays the Names tab. The Names tab shows detail of exactly where on my spreadsheet the chart is pulling the
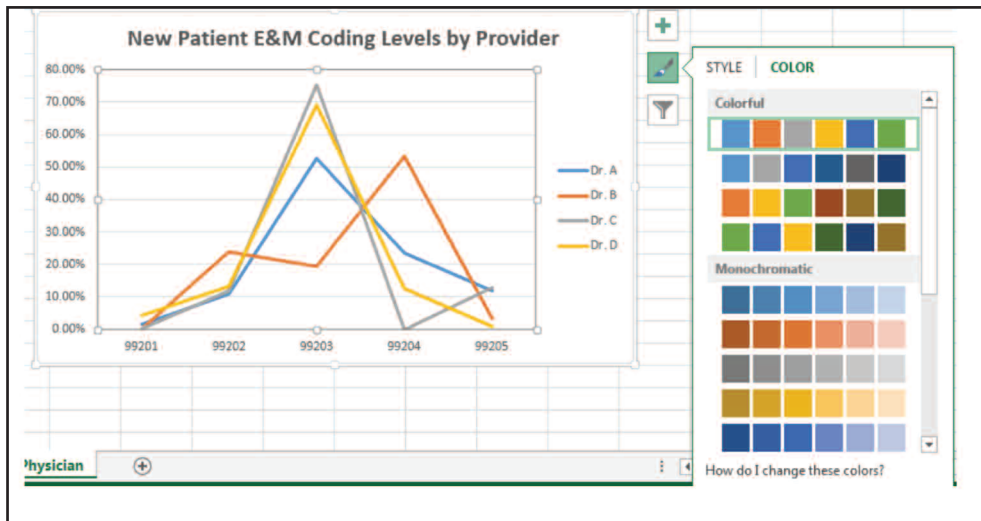
data. The Series data comes from Row 3 and the Categories pull from Column K. If I need to modify the data, such as pulling the established patient E&M codes instead of the new patient codes, I can easily access the Select Data window by clicking the Select Data button (circled in red at the bottom of Figure 5). As you would expect, the Apply button to the left of the Select Data button applies any filter changes you make.
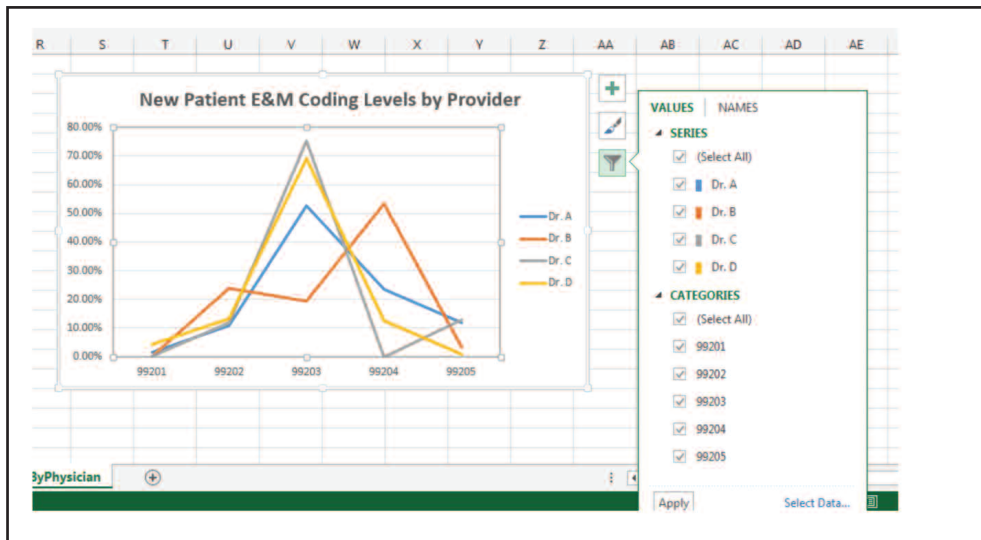
More to Come

Now that we are familiar with the new charting tools and icons next to the chart, in the next issue of *Billing* I will review some of the charting options available on the ribbon. Many of the ribbon options are now more conveniently accessed through the charting icons, but there are still important ways to customize your chart available through the ribbon. I will discuss some of those options next. In the meantime, mooresolutionsinc.com has several playlists and dozens of videos on charting data for a medical practice. There are also advanced videos with more complex charts to really impress your doctors. ■

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FIGURE 3

FIGURE 4

FIGURE 5