



Excel 2013 Charting Tips: Part Two

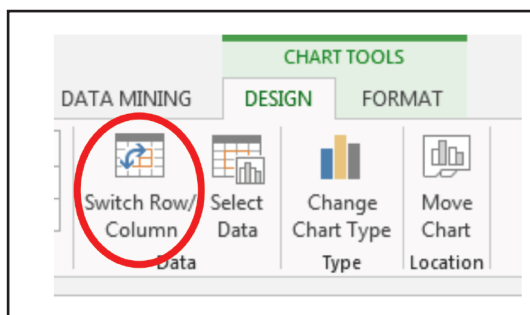
By Nate Moore, CPA, MBA, CMPE

This article builds on the foundation of the January/February 2016 and March/April 2016 *Billing* articles introducing Excel 2013 chart tools. In parts one and two we discussed the new icon tools next to Excel 2013 charts that provide tools closer to the chart instead of on the Ribbon. While the new icons next to a chart are convenient, there are ways to customize charts that can only be done through the Ribbon. This article will focus on ways to customize charts from the Chart Tools Design and Format menus on the Ribbon.

Switch Row/Column

Figure 1 shows the Switch Row/Column button on the Ribbon. I use this button frequently to quickly move data in my chart. For example, look at the data charted in Figure 2. The doctors are charted in columns while the locations are in the legend which controls the colors of the columns. All I need to do is to click the Switch Row/Column button and Excel transposes my data so that the locations are in the columns and the doctors are in the legend, as shown in Figure 3. Sometimes it's hard to see which representation of the data will be more meaningful to your chart readers without moving the data from columns to the legend and back. The Switch Row/Column feature toggles the data back and forth to make it easy to see both options.

FIGURE 1



Quick Layout

To the left of the Switch Row/Column button are options to change chart styles and colors, which are also available in the paintbrush icon next to the chart as described in Part 2 of this series of charting articles in *Billing*. The Quick Layout button, further to the left and shown in Figure 4, is only available on the Ribbon and is worth considering, especially if you have not spent a lot of time building Excel charts. Where Chart Styles (the paintbrush icon next to a chart) is more oriented toward formatting a chart, the Quick Layout button adds a variety of chart elements to see your data in different ways. Figure 5 shows 11 sample charts based on my existing chart. You can hover over each sample chart to have Excel temporarily show you what the proposed layout change will do to your chart. If you like what you see, simply click the Quick Layout to implement the changes in your chart. You can still continue to format and change the chart after applying Quick Layout suggestions. For my chart, most of the changes involved moving the legend or adding data labels, but Excel will customize the Quick Layout suggestions based on the chart you start with. In other words, Quick Layout will have different suggestions for a pie chart compared to a line chart or a column chart.

FIGURE 2

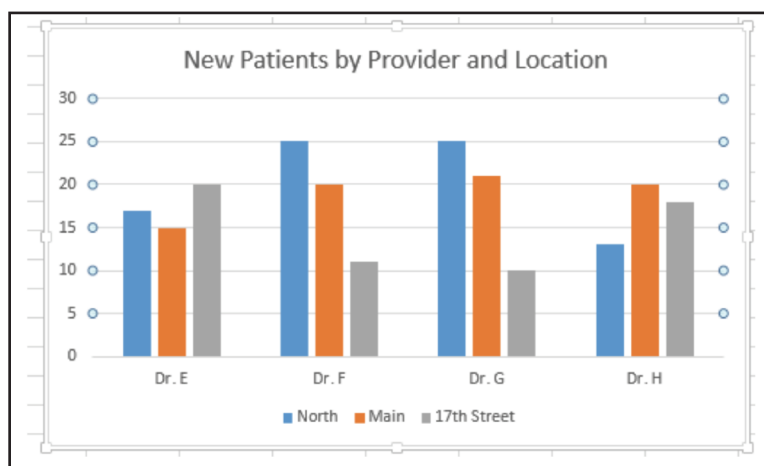




FIGURE 3

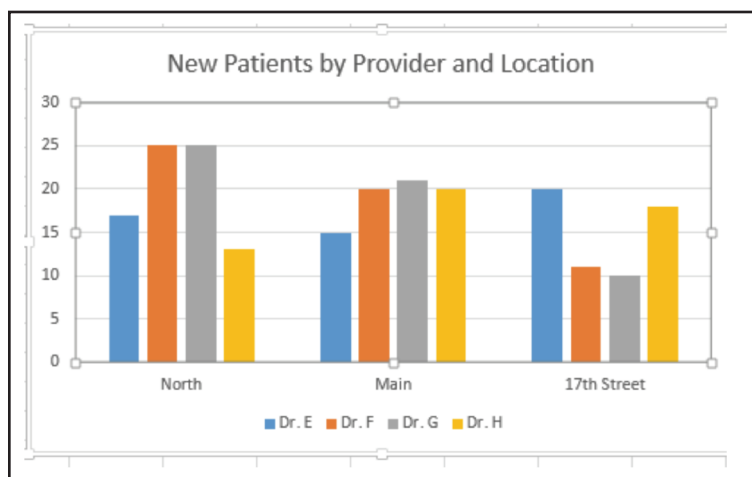


FIGURE 4

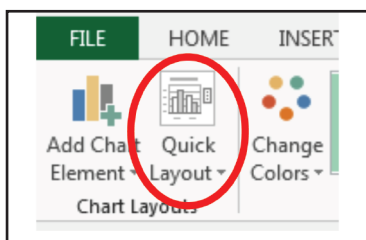
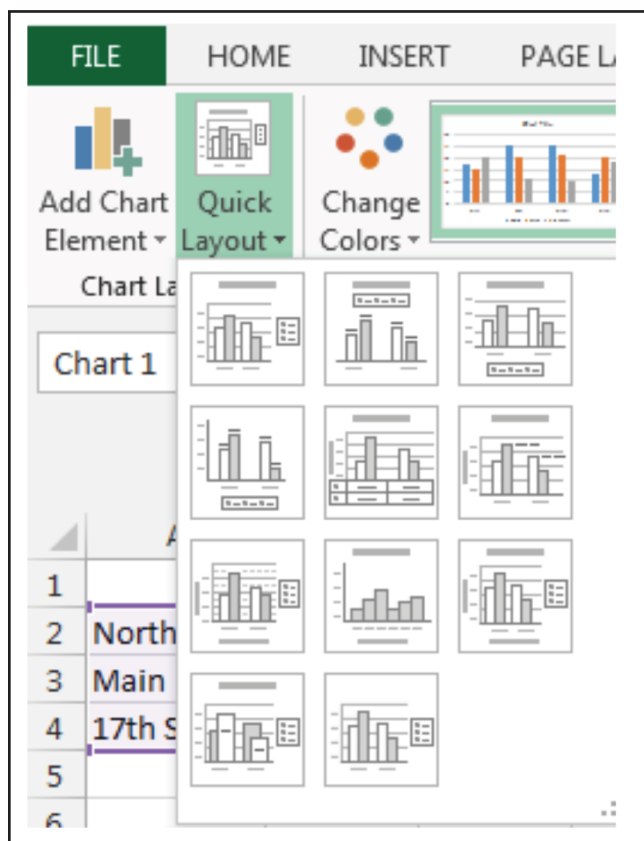


FIGURE 5



Format Tab

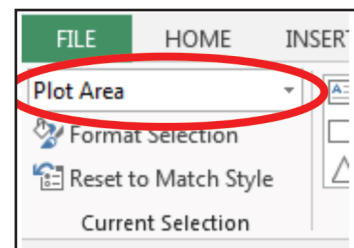
The Format tab under Chart Tools offers more in-depth ways to format your data. You can do things like changing the width of a line in a line chart, changing the color of a column, or adding shape effects to your chart. The Arrange section of Chart Tools allows you to align chart elements or move elements forward or backward, which may help order chart elements in a complex chart with a lot of moving parts.

The feature I want to point out on the Chart Tools menu is in Figure 6. The circled area highlights a dropdown box that lists all of the elements in the current chart. If you have lots of elements in your chart, it can be hard to click on the element in the chart to select the element and modify it. This dropdown box makes it easy to select the chart element you want, and the Format Selection button just below the dropdown box gives you access to the menu you need based on the chart element you selected. This trick comes in handy when building combo charts.

More to Come

Combo charts are the subject of my next *Billing* article. Combo charts, or combining two different types of charts (such as a line chart to display one chart range and a column chart to display another chart range), used to be fairly complex to build, but there is a new menu in Excel 2013 to make building combo charts easier. We will build a combo chart in the next *Billing* article. ■

FIGURE 6



Nate Moore, CPA, MBA, FACMPE writes custom SQL Server code to mine practice management

and clinical data for analysis in Excel, dashboards, and via email. Moore's first book, *Better Data, Better Decisions: Using Business Intelligence in the Medical Practice*, written with Mona Reimers, is an MGMA bestseller. His website, mooresolutionsinc.com, has several playlists and close to 100 videos on charting data for a medical practice. Moore's free Excel videos have been viewed over one million times and are available at mooresolutionsinc.com. Like PivotTableGuy on Facebook or follow @PivotTableGuy on Twitter to be notified each time an Excel video is released.