Sparklines Part 2

CUSTOMIZING SPARKLINES TO IMPROVE DASHBOARDS AND REPORTS

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In the last issue of *Billing* we discussed Sparklines — charts that fit inside a cell that are especially useful when creating dashboards. We created Line, Column, and Win/Loss Sparklines. While Sparklines don't have nearly as many options and settings as charts have, there are some things you can do to customize Sparklines. To access the customization tools, select a cell with a Sparkline. You should see the Sparkline Tools Design menu, as shown in Figure 1. We will discuss the Design options from left to right across the ribbon.

Edit Data Options

The first option, Edit Data, brings up the window shown in Figure 2. The top option, Edit Group Location & Data, allows you to create or edit multiple Sparklines at once. If you have a table of data with monthly trends for several physicians or locations, it's easy to create or edit Sparklines as a group rather than creating the Sparklines one at a time. You can also edit a single Sparkline's data if you need to.

The bottom setting, Hidden & Empty Cells, controls whether the Sparkline shows empty cells as gaps, as zero, or whether Excel should connect the data points with a line. There is also a check box that controls whether data in hidden rows and
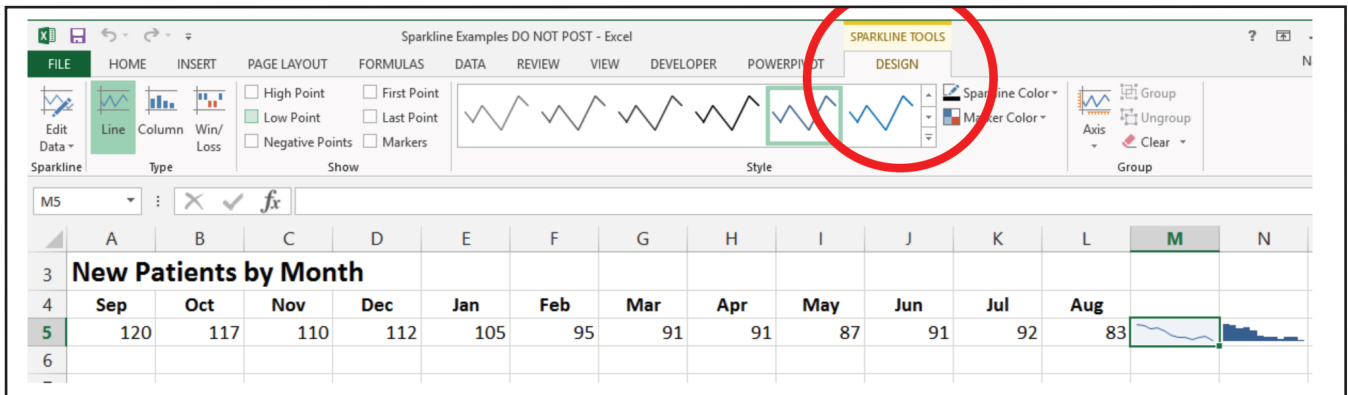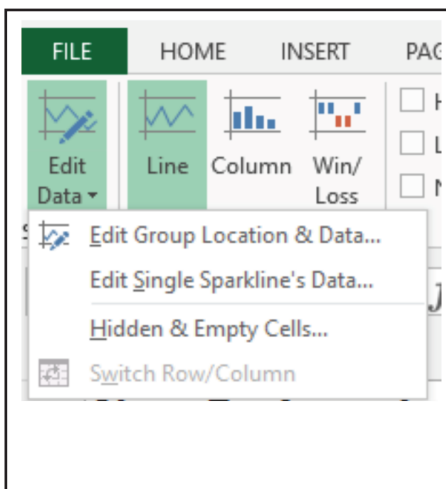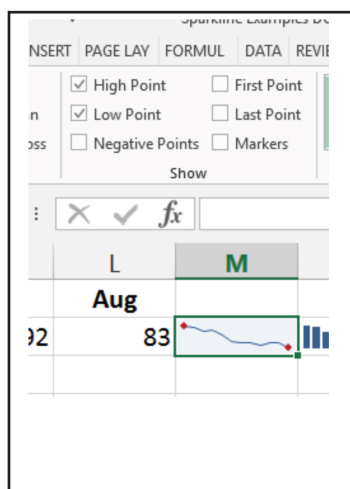
FIGURE 1

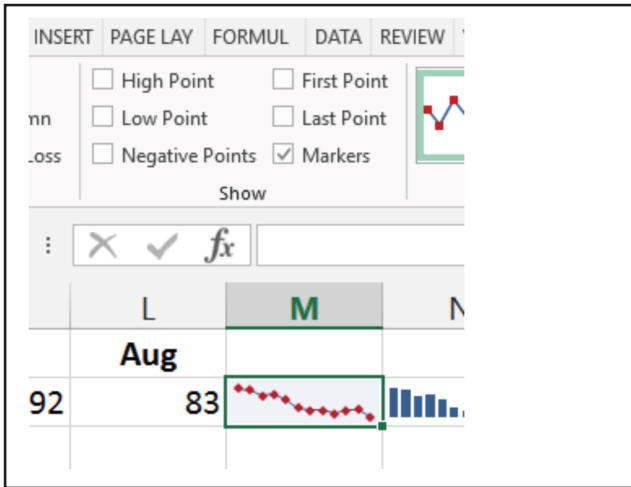**FIGURE 2**

FIGURE 3

columns (to hide a row or column right-click and select Hide) appears in the Sparkline. The Type section allows you to change an existing Sparkline type (Line, Column, or Win/Loss) without building a new Sparkline.

Sparkline Show Options

The Show section has six check boxes to highlight different aspects of a Sparkline. For example, checking High Point and Low Point will highlight the highest and lowest data points on a Sparkline, as shown in Figure 3. For now, the high and low points are both shown in red, but you can customize high and low point
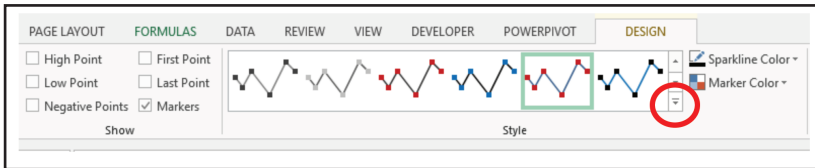
FIGURE 4

FIGURE 5

FIGURE 6

colors, as we will see in the next section. As you would expect, checking Negative Points will mark all of the negative numbers in the Sparkline. Checking First Point and Last Point will mark the first and last points in a Sparkline, which may help your Sparkline stand out on a complex dashboard. Checking Markers will mark every data point in a Sparkline, as shown in Figure 4. Play with these options, which can be used in combination, to get the Sparkline formatted the way you prefer.
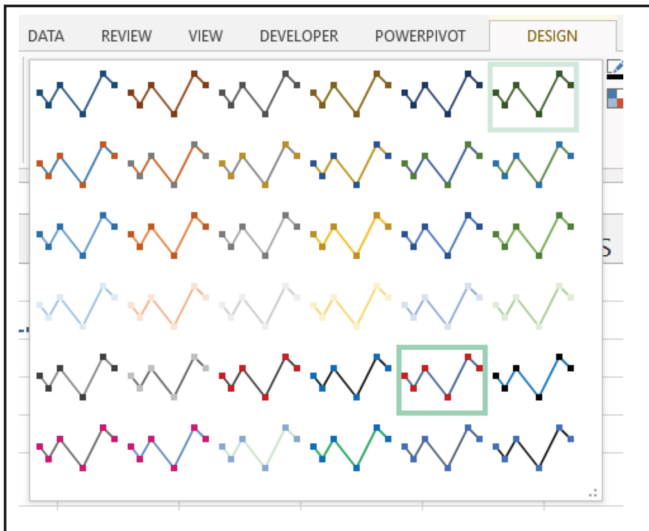
Sparkline Style Options

The Design tab Style section provides options for changing the color of the Sparkline, the color of the markers, the weight (thickness) of the Sparkline, and setting custom colors for different markers. For example, you can make the high point marker green and the low point marker red. Note that the Style section examples (in Figure 5) are based on the checkboxes selected in the Show section of the Sparkline Tools Design tab.

Since I have Markers checked, the Style section example has each data point marked. Also note the drop down button circled in Figure 5—click that button to see a variety of Style options (see Figure 6), again reflecting the checkboxes selected in the Show section. Simply click the Sparkline style you prefer to implement the new Style.

Sparkline Group Options

There are two important sections in the Sparkline Group section, axis options, and grouping options. The Axis options are shown in Figure 7. Notice that there are two horizontal axis options, General and Date. A General Axis assumes an equal interval between each data point on the Sparkline. A Date Axis plots the data-by-date. For example, assume I have three data points, January 2016, June 2016, and July 2016. (Please note that the cells have 1/1/2016, 6/1/2016, and 7/1/2016 stored in the cell. The cells are formatted to show the month, but the underlying data is dates, not text like "Jan" or "Jun.") A normal Sparkline, with what Excel refers to as a General Axis, is shown in Figure 8. Note how the data points are equally spaced in the Sparkline, even though the months are not equally spaced in a calendar. To have the Sparkline reflect the dates, select the Sparkline and click the Axis menu (shown in Figure 7). Choose Date Axis Type. Excel will open a window titled Sparkline Date Range as shown in Figure 9. Select the cells that correspond to the dates in the Sparkline

and click OK. Note the difference between the General and the Date Sparkline in Figure 10. The Date Sparkline clearly reflects the different dates compared to the General Sparkline.

Refer back to Figure 7 for one more Sparkline feature. Note that the minimum and maximum values on a Sparkline can be set automatically, as the same for each selected Sparkline, or a custom value. The minimum and maximum values on a Sparkline are quite important since, unlike a traditional Excel chart, a Sparkline offers very few visual clues to see if a value is high, low, or out of range. Be careful to make sure the minimum and maximum values are set so as not to mislead the reader into thinking there is not a problem when the data should reflect a problem, or vice versa.

I hope these two articles about Sparklines have given you plenty of ideas to improve dashboards and other reports in your practice. For more Sparkline tips and tricks, watch Excel Videos in the playlist at mooresolutionsinc.com/sparklines-2. ■

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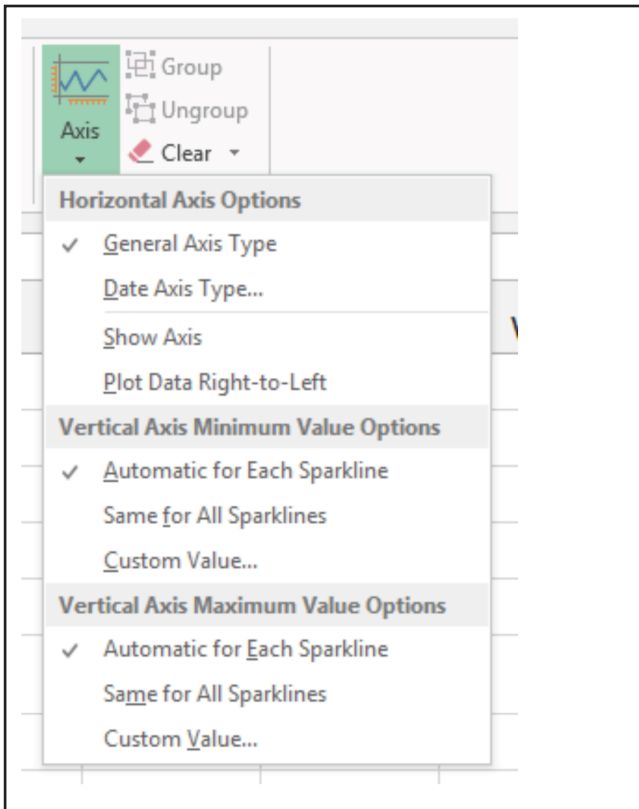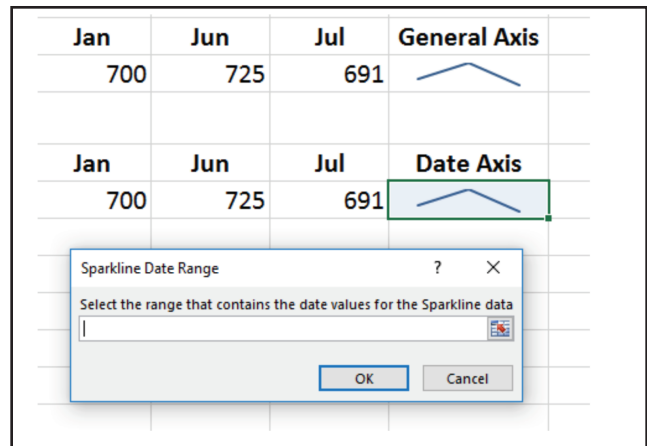
FIGURE 7

FIGURE 8

FIGURE 9

FIGURE 10