

Critical To Success

Excel 2010/2013 Chart and Dashboard Quick Reference Guide

For additional and advanced tips on creating dynamic Excel charts, go to Critical to Success, www.criticaltosuccess.com.

Chart with Clarity

- Remove chart junk like gridlines. Usually click on it and press Delete. Undo by pressing Ctrl+Z.
- Remove the legend if there is only one data series.
- Use 2D charts. Relationships are difficult to see in 3D charts.
- Use stacked column charts only when analyzing the relative amount of 100% in a column.
- Start charts at zero on the Y-axis so change can be seen relative to the entire range of Y value.
- Only use pie charts to show relative proportions of a total, for example, 27% of 100%.

Creating Charts

Creating a Chart



1. Select the data from a table. Row labels on left. Column labels above. Excel selects the best way to plot data, but you can change it. (See Switching Legend and Data Axis.)

	Jan	Feb	Mar
Actual	100	250	330
Budget	120	240	360

2. Choose Insert > Charts > chart type > chart subtype

Instantly Creating Charts

Create a chart almost instantly from data in a table. Data must be surrounded by white space and leave the upper-left cell blank.

1. Click inside the data.

2. Press Alt+F1 to open the default chart in the current worksheet.

or

2. Press F11 to open the default chart in its own chart sheet.

Charting Non-Adjacent Data

1. Select the top row of X-axis labels and adjacent data.

2. Hold Ctrl and drag across non-adjacent data.

3. Add more non-adjacent data by continuing to hold Ctrl and dragging across additional non-adjacent data.

4. Create the chart using menu or shortcut keys.

Adding or Removing Data in an Existing Chart

To add a data series,

1. Select the left label and data you want to add to the chart.

2. Press Ctrl + C (copy).

3. Select the chart and press Ctrl + V (paste).

To remove a data series,

1. Select the data series by clicking on the series column, line, bar, etc.

2. Press Delete.

Creating Charts with Tables that Expand as You Add Data

Column1	Jan	Feb	Mar	Apr
Product	\$ 5,186	\$ 5,038	\$ 5,026	\$ 5,396
Service	\$ 2,580	\$ 2,745	\$ 2,585	\$ 2,283
Subscriptions	\$ 3,982	\$ 4,294	\$ 4,112	\$ 4,280

Adding data to a table does not expand a chart. To create a data table so that new data automatically expands a chart,

1. Click inside the data.

2. Press Ctrl+T or choose >Insert>Table

New adjacent data and extended series will be included in the chart.

Creating Charts with Range Names that Expand as You Add Data

You gain a great deal of control over chart display, data selection, and

animation by using named ranges in combination with INDEX and OFFSET functions. To learn more and see tutorials go here and search “dynamic charts”,

<http://criticaltosuccess.com/dynamic-charts-in-excel-resize-with-offset-function-named-ranges/>

Changing Chart Types

1. Select chart to display chart menu tabs in ribbon.

2. Choose Design > Type > Change Chart Type > new type.

Selecting Charts and Elements

The selected chart or element has square “handles” at the edges.

Select a chart by clicking on the chart edge.

Selecting Elements in a Chart

Select a chart element with one of these methods,

- Clicking the element
- Clicking the chart, choosing Layout > Current Selection drop down (far left) > element
- Once element selected, go to next
 - element by pressing left or right arrow
 - collection of elements, e.g., data series, by pressing up or down arrow

Format an element by right-clicking it for the Format menu.

Selecting and Formatting Hard to Select Elements

If an element is hard to click, select the chart, then choose Format > Current Selection (far left) > select the element then click the Format Selection button.

Formatting Charts and Elements

With Ribbon Tools

Select chart, use three additional tabs on ribbon to format selection.

Design Change color themes and organization of elements

Layout Add or move chart elements such as legends or trend lines

Format Apply formatting to elements and shapes

Formatting with Predefined Themes



Preformatted chart themes apply formats and colors to all elements and data.

1. Select the chart.
2. On Design tab, Chart Styles group, click the drop-down and select a theme.

Formatting with Your Brand's Colors

Format charts with your company's branded colors. Marketing should have your fonts and color numbers. Colors should be in RGB (Red, Green, Blue) or HSL (Hue, Saturation, Luminance) format.

1. Select the chart element.
2. Right-click for Format menu, select color options such as Solid Fill or Solid Line.
3. Choose Colors > More Colors > Custom tab.
4. Enter your brand's colors.
5. Complete formatting and save the chart as a template. See the first part of Setting a Default Chart Style.

If you cannot get the color numbers from marketing, search for free "color picker" software on the Internet to pull your company's colors off the company website.

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Setting a Default Chart Style

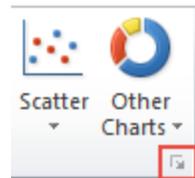
Save time by opening new charts in the type and format you most frequently use.

Create template of most frequently used chart and format.

1. Create a chart with your most frequently used type and formats.
2. Select chart.
3. Choose Design > Type > Save As Template. Save template with descriptive name.

Now save template as default,

1. Choose Insert > Charts and select the dialog launcher shown in red.



2. Click Templates on left.
3. Mouse over template icons to see name. Select template for default.
4. Click Set as Default Chart. Click Ok.

New charts will open in this format.

Manage templates from within the Chart dialog launcher with Manage Templates button.

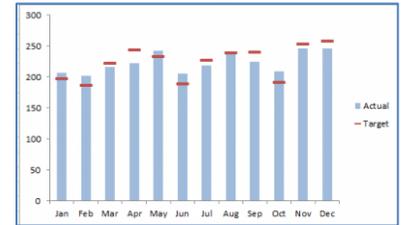
Formatting and Limiting the X- and Y-Axis

Change axis limits, add or remove tick marks, change point where axis cross, format numbers, change X-axis label intervals.

1. Right-click axis labels, all labels will be surrounded by a rectangle.
2. Choose Format Axis.
3. Select new axis settings. X- and Y-axis formatting options are significantly different.

Enhancing Charts

Charting Actual vs Target Budget Chart



Organizations must monitor actual vs. budget expenses and resources.

1. Create a column chart with columns for actual and budget amounts.
2. Right-click the target columns, click Change Series Chart Type, then select Line with Marker.
3. Right-click a marker so all markers are selected. Choose Format Data series.
4. Change Marker Options to Built-In with Type as a line and Size 12. Stay in the dialog box.
5. Select Line Color as No Line.

<http://criticaltosuccess.com/creating-an-actual-vs-target-chart-in-excel-using-floating-markers/>

Creating 5 Best Actual vs Target Charts

There's too much here for the Quick Reference Guide.

<http://criticaltosuccess.com/5-top-budget-vs-actual-excel-charts-you-need/>

Charting Two Rows of Labels on the X-Axis

Two rows of X-axis labels makes categories and time-series easier to read.



1. In the figure above, use two rows for the X-axis labels. The top row contains full dates, but is formatted to

show months by using a custom date format of “MMM”.

2. In the second row, enter YEAR() functions referencing the dates in the first row.
3. Select from the blank cell at top left of data range to the last cell in data range at bottom right.
4. Create the chart.

<http://criticaltosuccess.com/creating-an-excel-chart-with-two-rows-of-labels-on-the-x-axis/>

Adding a Trend Line



Add trend lines to unstacked column, line, area, bar, stock, XY (scatter plots), or bubble charts

1. Click the data set to receive the trend line.
2. Choose Layout > Analysis > Trendline > type of trendline.
3. While in the dialog box you can control trendline and forecasting attributes by clicking More Trendline Options.

Search “trend lines” at CriticalToSuccess.com for multiple ways to create and control dynamic trend lines.

Adding Numeric Data Labels

Data labels show the numeric value for a data point, e.g., the height of a column or value of a marker on a line chart.

1. Select chart to add data labels to all data. Select the data series to add to all points in data series or select the individual data point.
2. Choose Layout > Labels > Data Labels.
3. Select a position or More data label options for complete control.

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Modifying Chart Elements

Moving or Resizing a Chart, Drawing Object, or Form Control

Select the chart or object. Handles, small boxes, appear at the corners.

- Drag the center of chart/object to move.
- Drag a corner to change size. Hold Shift to keep size proportional.
- Hold Alt to align corners with cell grid as it moves.

Modifying Chart or Axes Titles, Legends, Data Labels

1. Select chart.
2. Choose Layout > Labels > select element to modify.

Changing Order of Chart Data and Legend

1. Select chart.
2. Choose Design > Data > Select Data.
3. In the Data Source dialog, select the data series to move, click up or down arrow.

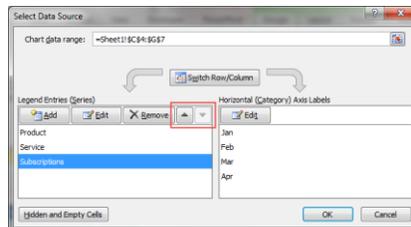


Chart Troubleshooting Undo

Press Ctrl+Z to undo your last action.

Switching X- and Y-Axis (Legend and Data Axis)

1. Right-click chart.
2. Choose Select Data, click Switch Row/Column button.

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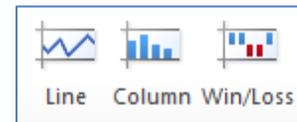
Charting with Missing Data, Empty Cells, or Zero Data

Charts get ugly and confusing when data is missing or cells are empty or zero. Here’s how to handle that,

- Enter a blank cell to create a gap in the chart.
- Enter =NA() to create continuity across missing data.
- To plot large volumes of data where some is missing, use a formula like =IF(B2=0,NA(),B2) where column B holds the data and the cell containing the formula is used by the chart.

Sparklines - Charts in a Cell

Creating a Sparkline



Sparklines are minimalist charts in a cell. Use them to show relationships or trends of data in the row.

1. Select the data.
2. Choose Insert > Sparklines > type.
3. Select location for chart. Click Ok.

Format Sparklines Axis

1. Select the cell(s) containing Sparklines.
2. Choose Design > Style > Group > Axis.

3. Select

Same for All - for all Sparklines to have the same Min/Max

Custom - for all Sparklines to have a fixed Min/Max

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www.CriticalToSuccess.com