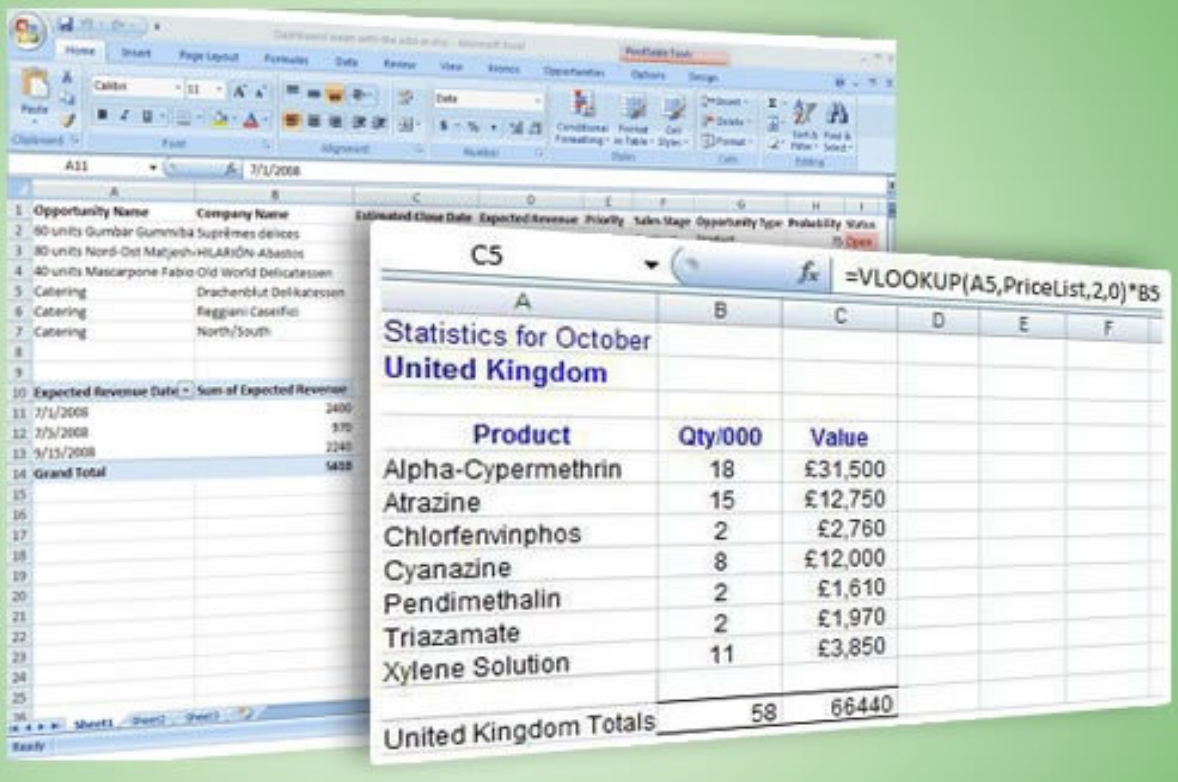
Mastering Excel

Excel Apps



Mark Moore

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Excel Apps

Prerequisites

To use Excel apps you will need the following on your computer:

- **Excel 2013 or later**
- **Internet Explorer or later (with the latest security updates)**

Apps are everywhere. First they appeared on smartphones and now they are in Excel 2013. In essence, an app in Excel is an embedded web page in a spreadsheet. This web page lives in Excel and responds to Excel data. There are two types of apps for Excel. The content app and the task pane app. The task pane app is a pane in Excel that gives you additional functionality (for example, a pane where you can translate words to another language directly in Excel). The content app is an object inside Excel that displays Excel data.

You will learn how to use the two built in apps in Excel: Bing Maps and the People Graph.

This lesson comes with two follow along workbooks that you can use to practice as you read. You can access the workbooks by signing up on my website at http://markmoorebooks.com/excel-apps/

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Bing Maps

In Excel 2013 you can add interactive geographical maps to help visualize your data. You are going to learn how to use this new functionality in this lesson.

My version of Excel already came with this feature. Look for it in the Insert tab:

If you don't see it in Excel 2013, you can get it from the Microsoft web site:

https://store.office.com/bing-maps-WA102957661.aspx

You can also add the map app this way:

1 - Click the Insert tab on the ribbon

2 - Click My Apps

3 - Click Office Store

4 - Search for Bing Maps

5 - Install it when you find it

Adding Bing Maps to Excel (if you don't have a Microsoft account)

To create a Bing map, you will need a Microsoft account. If you don't have one, the next steps will show you how to create one. Don't worry, they are free to create. If you already have a Microsoft account, you can skip past the account creating steps and start building

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the map.

1 - Open the follow along workbook named Maps.xlsx

You can sign up to get the follow along workbooks here:
http://markmoorebooks.com/excel-apps/

Here is a sample of the data that you are going to use to create a map.

	A	B	C	D
1	Sales by Product			
2				
3	City	Washer	Dryer	Dishwasher
4	New York	86,197	23,832	56,786
5	Los Angeles	56,721	40,935	84,400
6	Chicago	58,983	26,074	97,083
7	Houston	16,361	56,776	92,308
8	Philadelphia	15,136	31,895	52,733
9	Phoenix	58,550	73,171	31,809

2 - Select an empty cell (I selected I4)

3 - Go to the Insert tab

4 - Click on Bing Maps

You should see this appear on the worksheet.

5 - Click the ‘Sign In’ button

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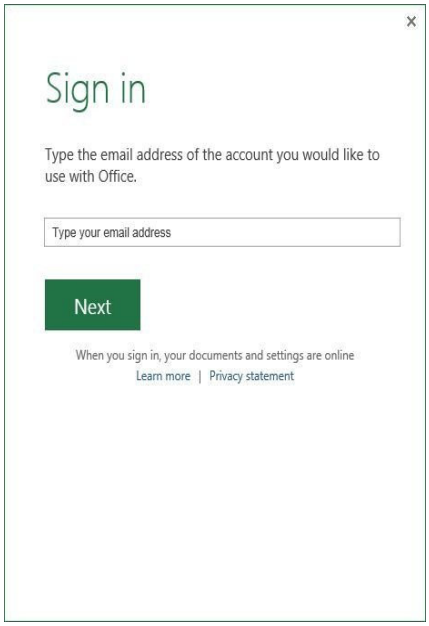
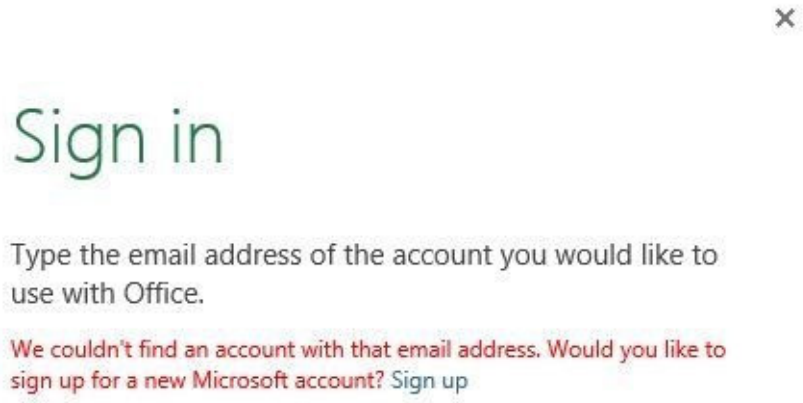
This window appears:



6 - Enter the email address you want to use with Office.

7 - Click Next

8 - If you don’t have a Microsoft account, you will see this message:



9 - Click the ‘Sign Up’ link

10 - Input all the information needed to create your new account. Remember, if you already have a Microsoft account, you don’t need to do this.

11 - Click on the ‘Create Account’ button

12 - Go to the email account you used and wait for the confirmation message from Microsoft

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13 - When it arrives, open it and click on the ‘Verify’ button

14 - The button will take you to the Microsoft web page. Sign in with the email and password you just created. (You can select the ‘Keep me signed in’ option box, if you like)

15 - After signing in, click on the OK button

16 - Go back to the verification email and make a note of the security code

17 - Go back to Excel and enter the security code in the Verify Email window

18 - Click ‘Next’ in the Verify Email window

Now you will see a blank box. This is where the map should be. Since you didn’t have a Microsoft account, this map won’t display any information.

You need to delete the map. Go ahead and try selecting the map and pressing the delete key.

It didn’t work did it? You can’t select it, you can’t right click it. How do you delete or move it around? Notice the small arrow in the top right corner of the map? Click it.

19 - Click on Select to select the empty map

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Now, if you hover your mouse on the border of the map, it will change to a cross hair. This is how you move or resize the map.

20 - With the map selected, press the Delete key

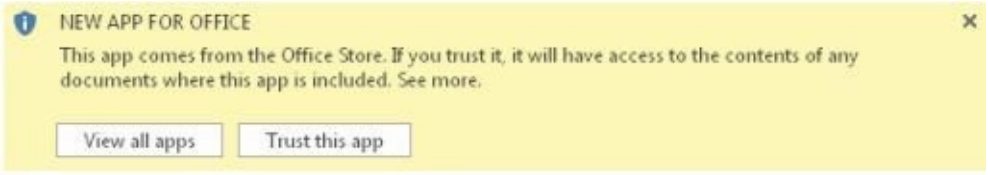
Now that you have a Microsoft account, you are going to create a functional map.

Creating a Bing Map

21 - Select range A3:D28 in the BingMaps worksheet

22 - Go to the Insert tab and select Bing Maps

23 - Select ‘Trust this App’



You will see this:

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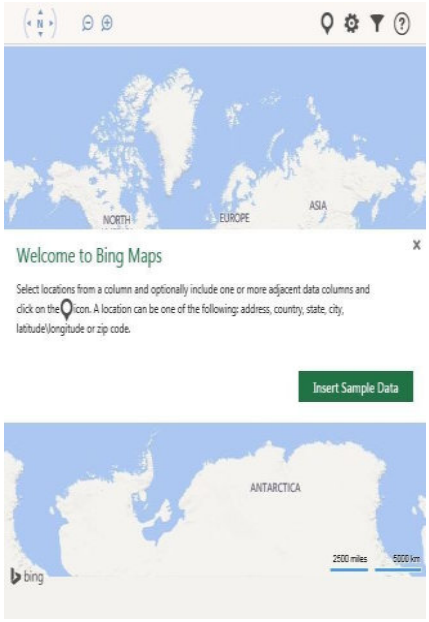

24 - Click on the small x to close the Welcome pane

25 - In the top right hand corner of the map, click the Filters button

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26 - Click on Select Data at the bottom of the right pane

Since you already selected the data, the range should be selected. If it’s not, click inside the box and select range A3:D28.

27 - Click OK

The map will update and insert pie charts for each city.

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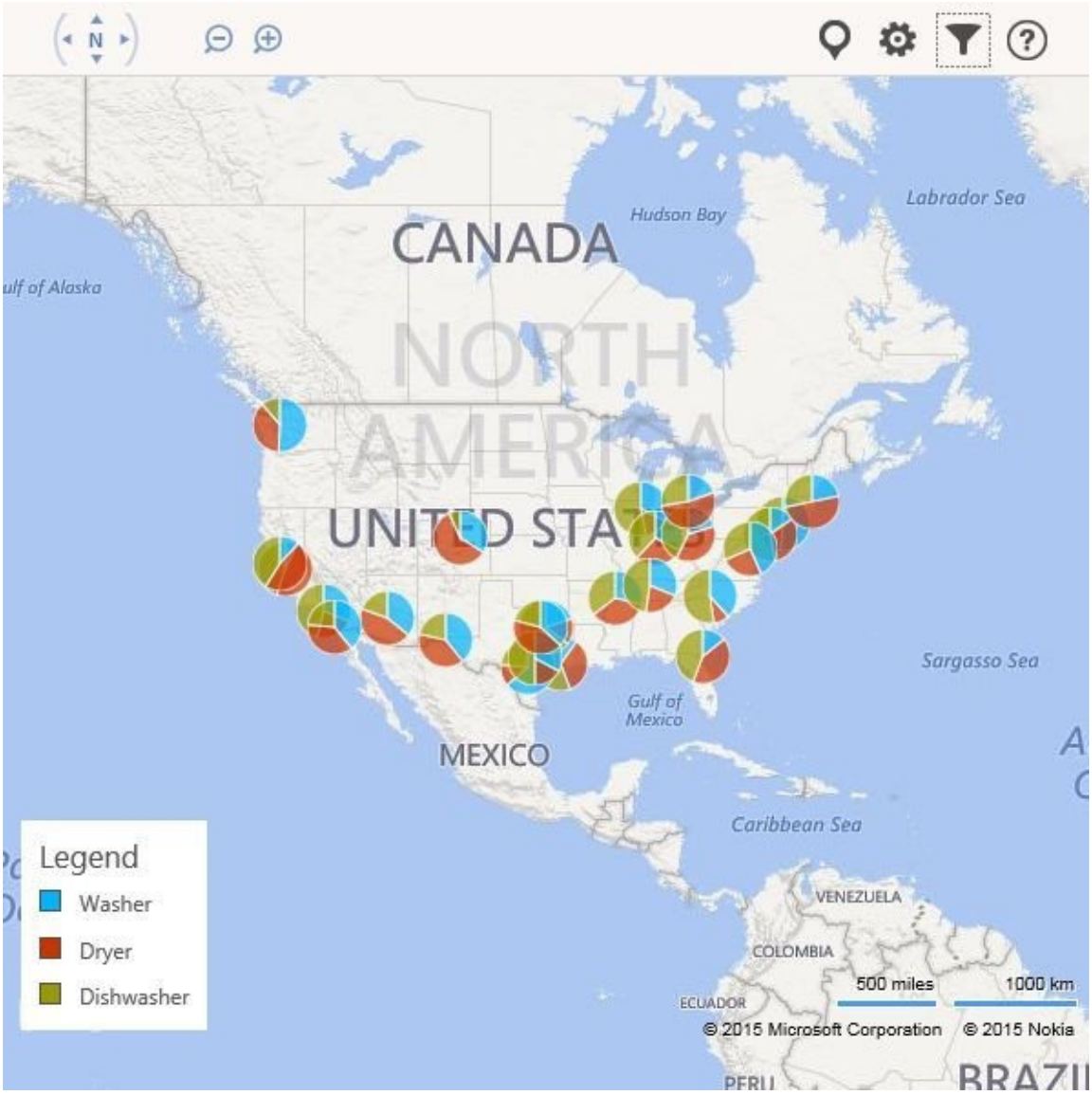

Looks great huh? Guess what? This map is interactive!

See those controls at the top left of the map? Go ahead and click on them. You can Zoom In, Zoom Out. If you have a mouse wheel, you can use it to zoom in and out. You can click and drag the map to pan around.

If you click on a pie chart, a pop up box will appear with the data for that pie.

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The app does support a few customizations (but not near as many as a native Excel chart).

Settings

Click on the small gear at the top right of the map. This opens the settings pane. Here you can change the map type, make the pie charts circles and change the colors of each category.

Click on the arrow to collapse the Settings pane.

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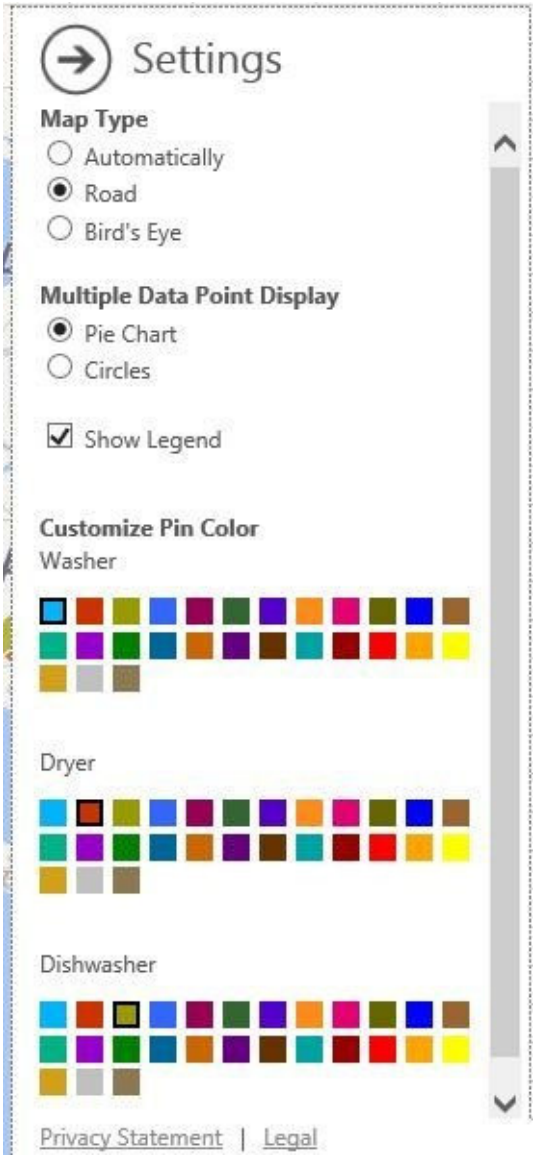

Filters

Click on the Filters button and this pane appears. You can hide certain cities by using the checkboxes. You can change the data range by clicking ‘Select Data’ at the bottom of the pane.

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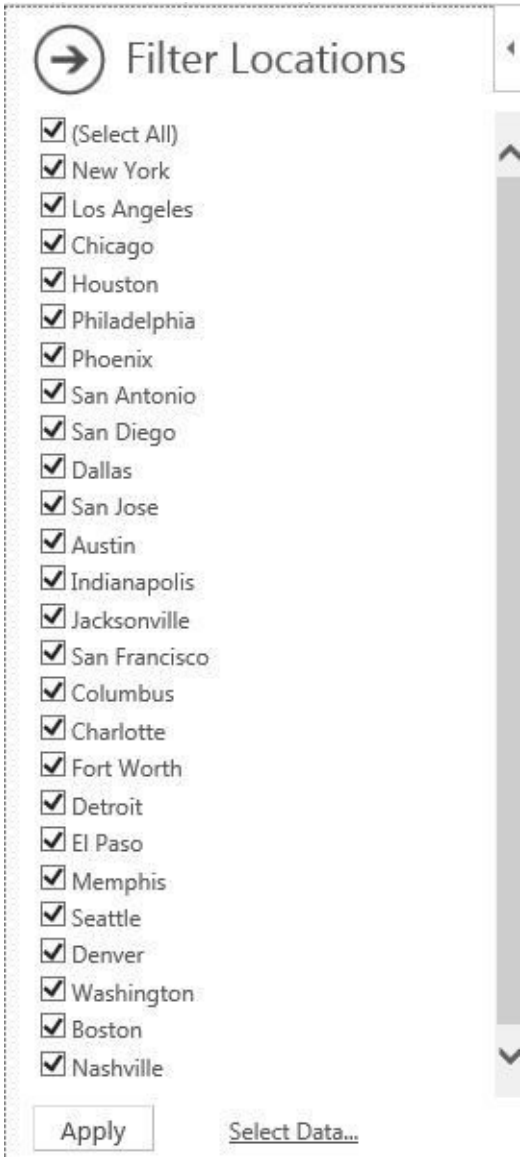

Help

The help button doesn’t show the help screen. It just displays that initial pane you saw when you first created the chart.

Remember the small arrow you used to select the chart? That button has a few more options now that the chart is functional. Hide any open panes and then click on the small arrow. You will see this pane:

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Get Support: This takes you to the Microsoft forums

Select: This lets you select the chart and move it or resize it

Reload: This resets the chart to its original state

View Source: This lets you see the source XML of the chart

Show as Saved Image: This option is very useful. It freezes the map to the position and zoom level it was in at the last time you saved the Excel file. It also freezes the map so users can't alter it. However, this is not secure at all. If a user knows how to get to this pane, they can unselect this option. Protecting the worksheet has no effect on the map. I don't know if it is possible to lock this down.

Security Info: I'm not sure what this was. It now points to a non-functioning web page.

Bing Maps2

The follow along workbook has an extra worksheet titled BingMaps2. This map is made exactly like the map you just built. I included this one so you can see how the map looks when there are not multiple data points for a city.

Instead of pie charts for every city, the map will insert a circle. The size of the circles indicate the relative amount of sales.

This worksheet is a mini dashboard that I created for you using VLOOKUP, Data Validation and Bing Maps. Select a different product by using the drop down in cell B3 to see the maps update.

If you have gone through my VLOOKUP lesson you will see that nothing on this

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worksheet is terribly difficult. The only thing this worksheet does is take standard Excel functionality and use them together so the end result (this mini dashboard) is greater than the sum of the parts.

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People Graph

The people graph app displays metrics related to people in a more pleasing way than plain bar or column chart can. You don't have to use people oriented data but you will have to change the icons from people to moneybags, clocks, hearts, etc.

Creating this type of chart is very similar to creating a Bing Map chart.

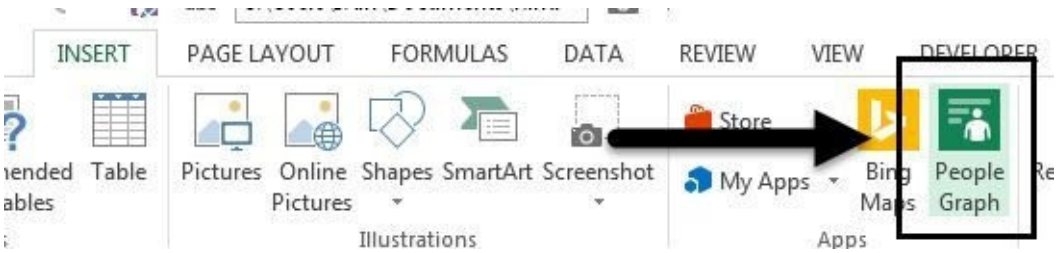
1 - Go to the People Graph worksheet in the Maps.xlsx follow along workbook.

You are going to make a graph of this sample data.

	A	B
1	**Department**	**Headcount**
2	Sales	68
3	Operations	25
4	Finance	68
5	Facilities	73
6	Accounting	24
7	Human resources	10
8	IT	83
9	Marketing	70
10	Quality Control	97
11	Customer Service	24
12	Engineering	59
13	R&D	52
14		

2 - Select range A1:B13

3 - Go to the Insert tab and select People Graph



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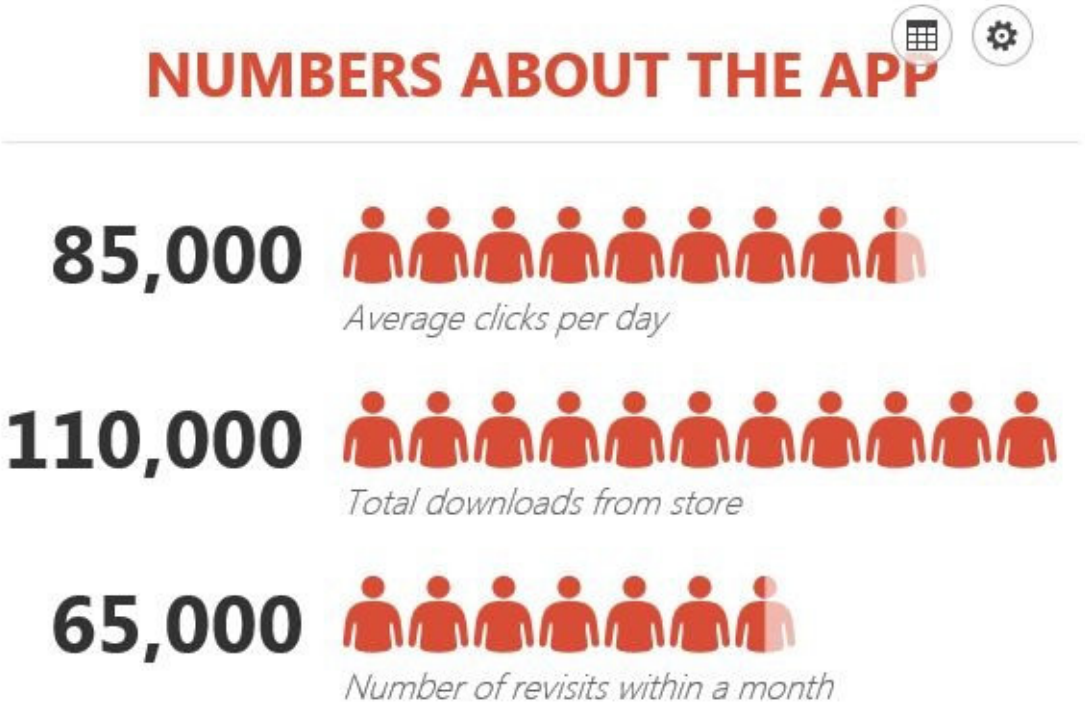
4 - If you see this window, click ‘Trust this app’. Like the previous app, it comes from Microsoft and is safe.

A sample graph will appear.



5 - Click the data icon to select your data

6 - Click on the Select your data button

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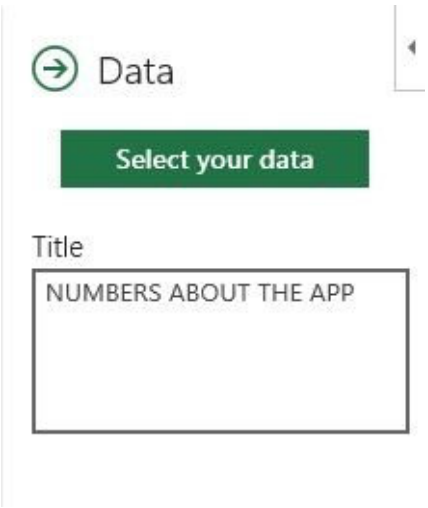
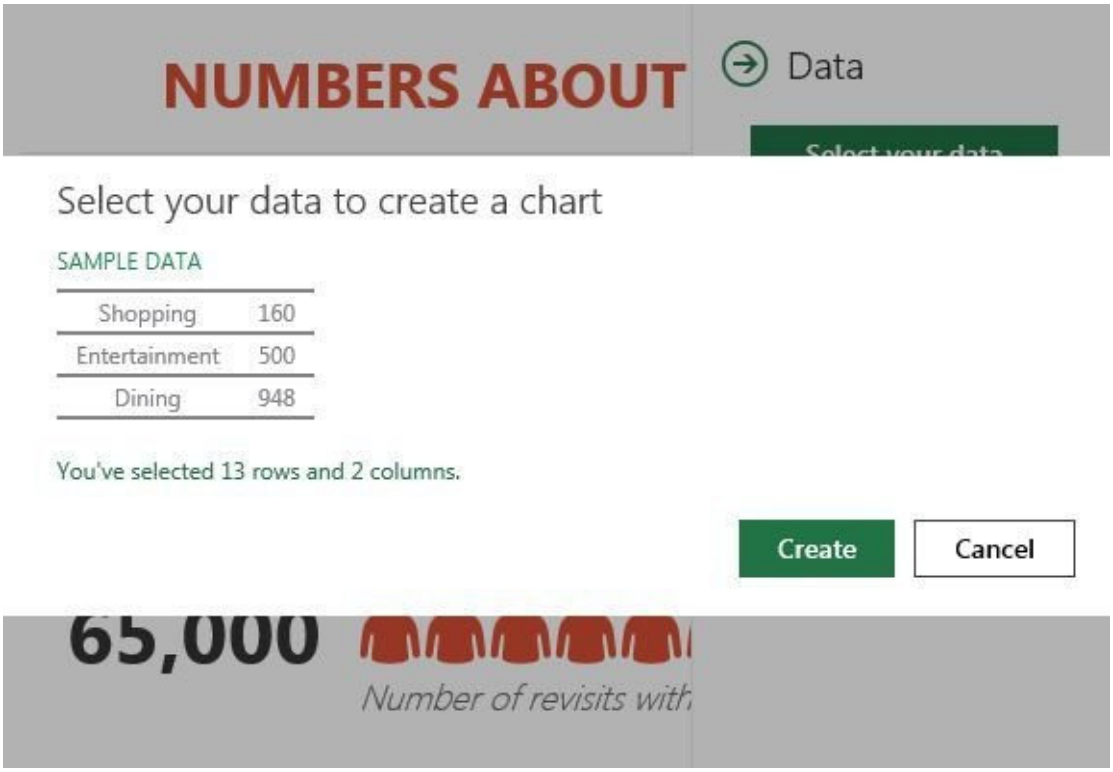


7 - You should have selected your data in a previous step. If you have not, select it when this window appears.

This app does not have a range box like the previous app had. It is a bit confusing. When the image below is visible, that's when you select your data. If you select incomplete data the text that says 'You've selected 13 rows and 2 columns' will change to red and tell you to select two columns.

Select range A1:B13. The pane should say 'You have selected 13 rows and 2 columns' in green.



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8 - Click on Create

The graph is created.

There are a few things that need to be fixed. The title and the departments. Notice that not all departments are showing.

9 - Click on the Data icon again

10 - Input an appropriate title for the chart. I used Headcount by Dept

11 - Click the arrow to close the pane

Now you have to resize the chart so it will display all the departments.

12 - Click on the small arrow in the top right of the chart

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13 - Click Select in the menu

14 - Click and drag the chart border to make it taller so all the departments appear

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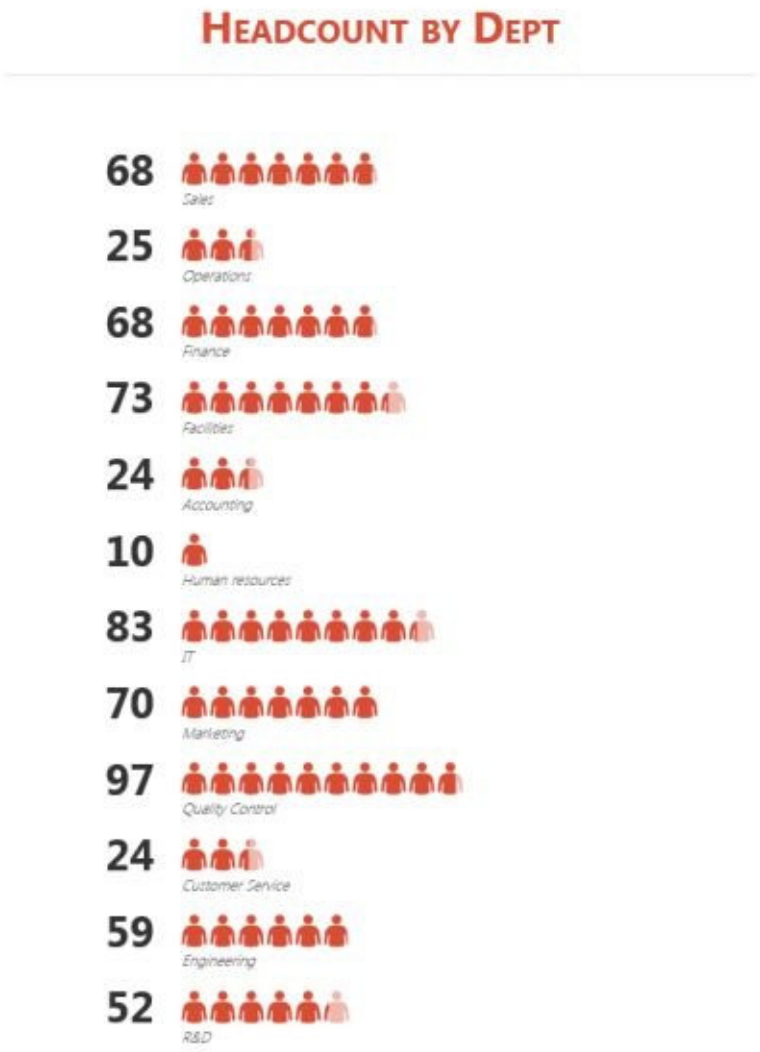

That’s the people graph. This graph is more visually appealing than the standard Excel column/bar charts.

Graph Customization

There are a few customizations you can make to this chart.

15 - Click on the gear icon in top right arrow in the graph. This is the settings icon.

You will see three new tabs: Type, Theme and Shape.

Type

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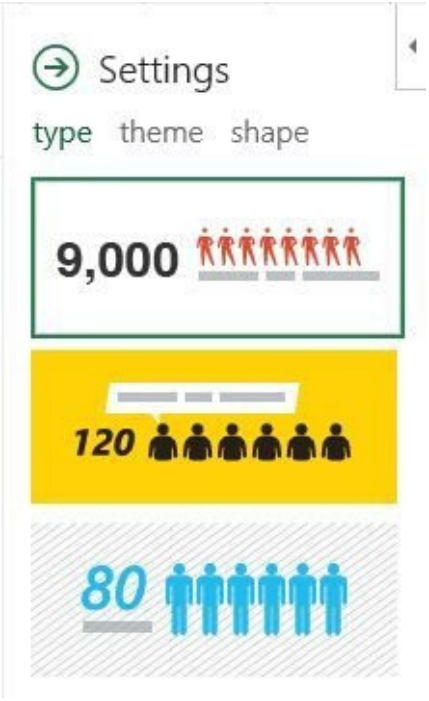
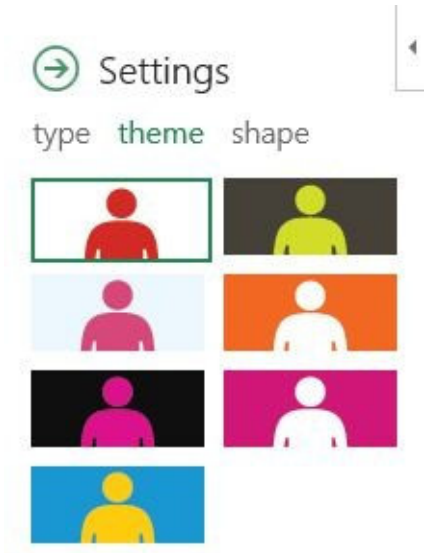


Theme



Shape

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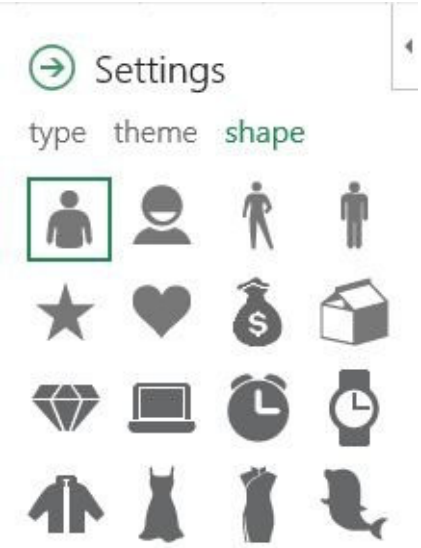
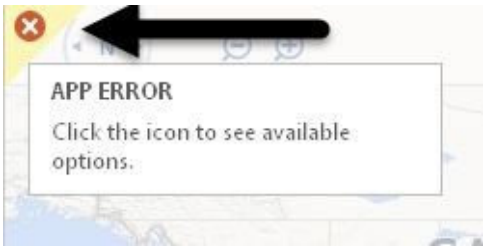


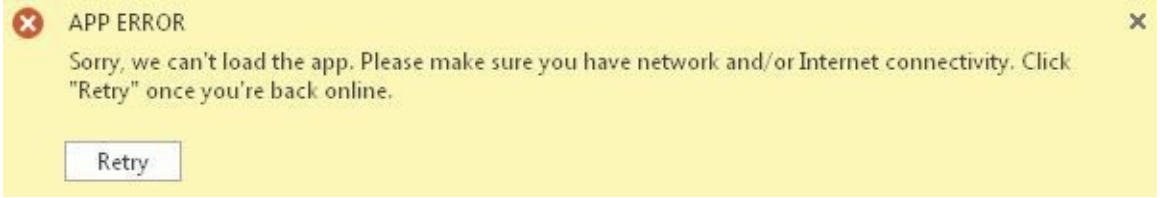
Play around with making different selections here. You can change the color scheme, the backgrounds of your chart and the icons.

App Drawbacks

One drawback that these apps have is that the computer must have internet access. If it does not, the app will have a small red x in the top left corner.



If you click on the red x, this message appears.



The only way to get the app to work is to connect to the internet.

Keep this in mind if you are using apps for a presentation. Make sure you will have

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internet connectivity.

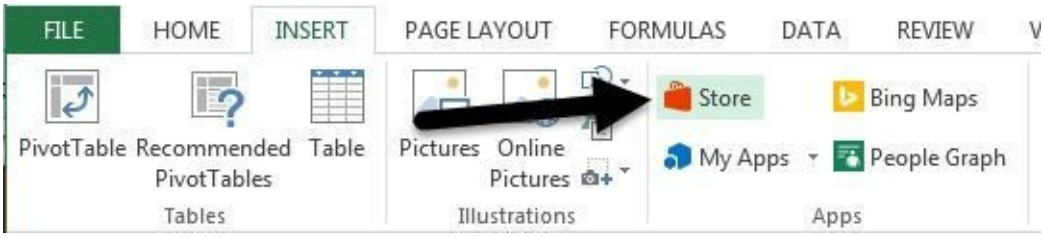
Getting More Apps

The two charts apps you have used today are developed by Microsoft and included in Excel 2013 and Office 365. However, there are many more apps available in the app store. Some of these apps are free, many are not. Some of these apps are built by large companies, others are built by small independent developers. Browse the app store and see if you can find a new app that will help you out.

One word of caution. Apps can connect to the internet to retrieve information and extend their functionality. If you plan to use these apps at your workplace and you have strict data security policies or you routinely deal with sensitive information, please check with the appropriate departments or policies to make sure it is ok to use Excel apps.

To Get to the App Store

Click on the Store button in the Insert tab.



Conclusion

That’s it for the built in chart apps in Excel. I hope you have enjoyed this lesson. I hope you will be able to use this in your day to day work.

The next few pages list all the other Excel lessons I currently have published.

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