# What's new in Excel 2013?

Provided by Work Smart



### Contents

Topics in this guide include: Visualize Share Analyze Touch For more information The first thing you see when you open Excel<sup>®</sup> 2013 is a brand new look. It's cleaner, but it's also designed to help you get professional-looking results quickly. You will find many new features that help you draw more persuasive pictures of your data, guiding you to better, more informed decisions.

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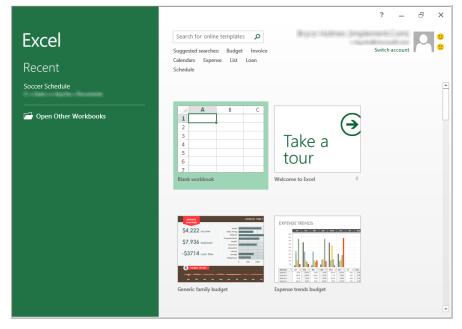
More Work Smart content: http://microsoft.com/microsoft-IT

### Visualize

With Excel 2013, you can bring analysis to life with just a few taps or clicks.

### Get started quickly

If you don't know where to start or how to structure or format your spreadsheet, select from a collection of professionally designed templates, including budgets, calendars, forms, reports, and more. Templates do most of the setup and design work for you so you can focus on the results.

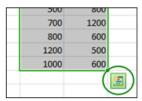


# Instant data analysis with the Quick Analysis tool

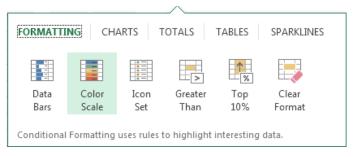
Use the new Quick Analysis tool to convert your data into a chart or table in two steps or less. Preview your data with conditional formatting, sparklines, or charts, and make your choice stick with just one tap or click.

#### Use the Quick Analysis tool

- 1. Select the cells that contain the data you want to analyze.
- 2. In the lower-right corner of the highlighted selection, tap or click the **Quick Analysis Lens** button (or press CTRL+Q).



 In the Quick Analysis gallery, tap or click the appropriate tab for the action you want to apply. For example, tap or click FORMATTING.



4. Hover over each formatting item to see a live preview. For example, hover over **Color Scale** to help you spot high and low costs in your data.

|                   |             | Aug |       | Sep |       | Oct          |           | Nov        |             |                 |             |                 |
|-------------------|-------------|-----|-------|-----|-------|--------------|-----------|------------|-------------|-----------------|-------------|-----------------|
| Advertising       | \$<br>1,400 | \$  | 7,200 | \$  | 5,700 | \$           | 6,900     | \$         | 3,800       |                 |             |                 |
| Digital Marketing | \$<br>3,400 | \$  | 2,300 | \$  | 9,400 | \$           | 7,300     | \$         | 5,600       |                 |             |                 |
|                   | \$<br>4,700 | \$  | 9,300 | \$  | 3,700 | \$           | 8,600     | \$         | 7,900       |                 |             |                 |
| Public Relations  | \$<br>2,300 | \$  | 4,300 | \$  | 4,600 | \$           | 5,600     | \$         | 3,700       |                 |             |                 |
| Promotions        | \$<br>5,600 | \$  | 5,900 | \$  | 2,100 | \$           | 2,300     | \$         | 4,800       |                 |             |                 |
|                   |             |     |       |     | _     |              |           |            |             |                 |             |                 |
|                   |             |     |       |     | - F   | ORMA         | ITING     | CHA        | RTS T       | OTALS           | TABLES      | SPARKLINES      |
|                   |             |     |       |     |       |              |           |            |             | >               | 1 %         |                 |
|                   |             |     |       |     | _     | Data<br>Bars | Co<br>Sci | lor<br>ale | Icon<br>Set | Greater<br>Than | Top<br>10%  | Clear<br>Format |
|                   |             |     |       |     |       | onditio      | nal Forma | atting u   | ses rules t | o highlight     | interesting | data.           |

5. Tap or click the preview that you like best to insert it into your spreadsheet.

**NOTE** You might notice that the options you can choose from are not always the same. That's because the options change based on the type of data you select in your workbook.

### Fill out an entire column of data in a flash

Flash Fill is like a data assistant that finishes your work for you. As soon as it detects what you want to do, Flash Fill enters the rest of your data, based on the pattern it recognizes in your data. Flash Fill is useful whenever you have a lot of data to clean up, for example, when you import it from another program.

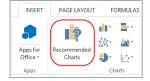
|    | Α     | В                                 | С      | D                      |
|----|-------|-----------------------------------|--------|------------------------|
| 1  | Date  | Transaction                       | Budget | Department             |
| 2  | 40849 | 801010-Ads-Advertising-John       | 1300   | Ads-Advertising        |
| 3  | 40850 | 802100-Evs-Events-Jenny           | 1830   | Evs-Events             |
| 4  | 40851 | 804020-Dmg-Digital Marketing-Bill | 600    | Dmg-Digital Marketing  |
| 5  | 40854 | 807800-Pro-Promotions-Sally       | 1800   | Pro-Promotions         |
| 6  | 40855 | 801010-Ads-Advertising-Paul       | 2730   | Ads-Advertising        |
| 7  | 40855 | 802100-Evs-Events-Paul            | 1750   | Evs-Events             |
| 8  | 40856 | 804020-Dmg-Digital Marketing-John | 1200   | Dmg-Digital Marketing  |
| 9  | 40857 | 806002-Prs-Public Relations-John  | 3500   | Prs-Public Relations   |
| 10 | 40858 | 807800-Pro-Promotions-Jenny       | 2500   | Pro-Promotions         |
| 11 | 40861 | 803003-Evs-Events-Bill            | 1500   | Evs-Events             |
| 12 | 40862 | 801010-Ads-Advertising-Sally      | 800    | Ads-Advertising        |
| 13 | 40864 | 802100-Evs-Events-John            | 2370   | Evs-Events             |
| 14 | 40865 | 804020-Dmg-Digital Marketing-Bill | 700    | Dmg-Digital Marketing  |
|    |       |                                   |        |                        |
|    |       | Excel uses the pattern in the     |        | to fill in the rest of |
|    |       | existing data                     |        | your data.             |

### Create the right chart for your data

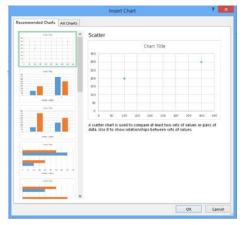
Find the best way to visualize your data in a chart by using **Recommended Charts**. Excel recommends the most suitable charts for your data. You can preview how your data appears in the different charts, and then select the one that shows the insights you want.

#### To use Recommended Charts:

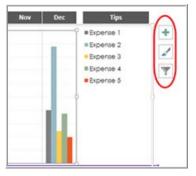
- 1. Select the data that you want to chart.
- 2. On the **Insert** tab, in the **Charts** group, tap or click **Recommended Charts**.



3. In the **Insert Chart** dialog box, on the **Recommended Charts** tab, scroll through the list of charts that Excel recommends for your data, and then tap or click any chart to see how your data will look. To see previews of additional types of charts, tap or click the **All Charts** tab.



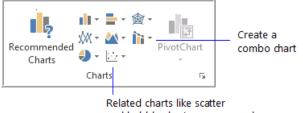
- 4. When you find the chart you want, tap or click **OK**.
- 5. Use the **Chart Elements**, **Chart Styles**, and **Chart Filters** buttons next to the upper-right corner of the chart to add chart elements like axis titles or data labels, customize the look of your chart, or change the data that's shown in the chart.



To access additional design and formatting features, tap or click anywhere in the chart to add the Chart Tools to the ribbon, and then tap or click the options you want on the **Design** and **Format** tabs.

### Chart ribbon changes

In addition to the new **Recommended Charts** button, the Excel 2013 ribbon groups related types of charts together, like scatter and bubble charts. The ribbon also includes a new button for combo charts.

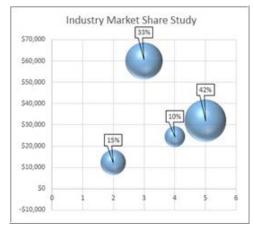


and bubble charts are grouped together.

Also, when you tap or click a chart, you will see a simpler **Chart Tools** ribbon, with just **Design** and **Format** tabs.

### Richer data labels

With Excel 2013, you can include rich and refreshable text from data points or any other text in your data labels, enhance them with formatting and additional freeform text, and display them in just about any shape. Data labels stay in place, even when you switch to a different type of chart. You can also connect data labels to their data points with leader lines on all charts, not just pie charts.



### Animated charts

Chart animations display data changes in real time as you adjust numbers or add new data points to your workbook. Animated charts are fun to watch and the movement in the chart makes the data changes stand out.

### One workbook, one window

In Excel 2013, each workbook has its own window, which makes it easier to work on two workbooks at once. It also makes it easier when you're working on two monitors.



### Apps for Office integration

With Excel 2013, you can create and use custom add-ons to help you combine your data with other data and visualizations available on the web, such as Bing<sup>®</sup> maps. For more information, see the article Overview of Apps for Office 2013

at http://technet.microsoft.com/en-us/library/jj219429.aspx.

### Share

With the new Excel, you can save your workbooks online in SkyDrive<sup>®</sup> Pro, and then easily share them with your co-workers. No matter what device they're using or where they are, everyone can work with the latest version of a worksheet. You can even work together in real time.

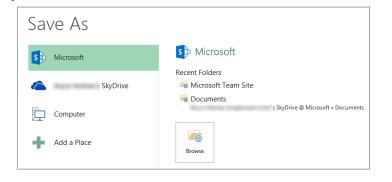
### Save and share files in the cloud

You can save directly to SkyDrive Pro from Excel. With your spreadsheets stored in the cloud, you can get to them anytime you're online. It's also easier to share documents stored in the cloud. You can even work together with colleagues on the same file at the same time.

**CAUTION** Do not use your personal SkyDrive (use SkyDrive Pro instead) to share business documents. Your personal SkyDrive is a consumer service and is not intended for confidential business information. Also, do not store HBI or PII content to SkyDrive Pro.

#### Save a document on SkyDrive Pro

- 1. Tap or click **File**, and then tap or click **Save As**.
- 2. Under **Save As**, tap or click to select the SkyDrive Pro location you desire.



**NOTE** After you save files on SkyDrive Pro, you can create a local cache of the files for offline usage with one click by clicking the **Sync** button, which appears in every document library. The local folder will always sync with the online library when you regain connectivity.

|                   | •     | ø | ? |
|-------------------|-------|---|---|
|                   | SYNC) |   | R |
| Search everything |       |   |   |

### Invite people to share a document saved on SkyDrive Pro

After you save a document on SkyDrive Pro, you can invite people to share the document. You can even set up permissions (view or edit) for the document from Excel.

1. In Excel, open the document that you want to share.

- 2. Tap or click File, and then tap or click Share.
- 3. Under Share, tap or click Invite People.

| Share                        |   |
|------------------------------|---|
| FY13 Budget<br>SkyDrive @ Mi | Invite People<br>Type names or e-mail addresses |
| Share                        | 🖗 💷 Can edit                                    |
| 🔊 Invite People              | Include a personal message with the invitation  |
| Email                        |   |
| Present Online               | **  |
| Send by Instant Message      | Share   |

- 4. On the right side of the screen, under Invite People:
  - a. To share a document, enter the names or email addresses to invite people.
  - b. Select **Can edit** or **Can view** to set permissions for the document.
  - c. Enter a message to include with the invitation (optional).
- 5. Tap or click Share.

**NOTE** If you haven't saved the document to SkyDrive Pro before you start this procedure, Excel walks you through the process of saving to SkyDrive Pro before you invite people.

### Present a workbook in a Lync meeting

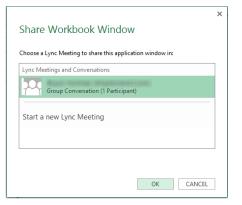
You can share your workbook and collaborate in real time with others in a Lync<sup>®</sup> 2013 conversation or online meeting. You can also allow others to take control of your workbook.

To share a workbook in a Lync meeting:

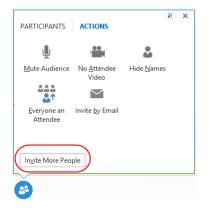
- 1. In Excel, close any open workbooks you don't want to share.
- 2. Tap or click File, and then tap or click Share.
- 3. Under Share, tap or click Present Online.
- 4. Under Present Online, tap or click Present.



- 5. If Lync isn't running, sign in to continue.
- 6. In the **Share Workbook Window** dialog box, pick a scheduled meeting or tap or click **Start a new Lync meeting**, and then tap or click **OK**.



- 7. In Lync, do one of the following:
  - Begin your scheduled meeting.
  - Begin a new meeting by inviting your attendees. Tap or click the Invite More People <sup>3</sup> button, tap or click Invite More People, and then select or type the names of your attendees.



8. To stop sharing, tap or click **Stop sharing** at the top of the screen.



**NOTE** You can also share your workbook by attaching it to an Instant Message (IM).

### Embed worksheet data in a web page

To share part of your worksheet on the web, you can simply embed it on a web page. Other users can use Excel Web App to edit the data or they can open the embedded data in Excel.

### Analyze

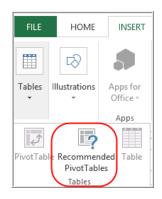
Excel 2013 provides many enhancements for working with PivotTables and PivotCharts.

# Create a PivotTable to analyze worksheet data

Use the new **Recommended PivotTables** feature to have Excel recommend different ways to summarize your data. Excel provides a quick preview of the field layouts. Select the table that provides the insights you need.

#### To use Recommended PivotTables:

- 1. Make sure that your data has column headings or table headers, and that there are no blank rows.
- 2. Tap or click any cell in the range of cells or table.
- 3. On the **Insert** menu, tap or click **Tables**, and then tap or click **Recommended PivotTables**.



 In the Recommended PivotTables dialog box, tap or click each of the samples on the left side of the screen to see a preview of your PivotTable.

| Recommended Pive                        | otTables      |   |                      |                    | ? 💌 |
|---|---------------|---|----------------------|--------------------|-----|
| Count of Budge<br>Row Labels Count of B |               | Â | Count of Budget Cate | gory               |     |
| B.Fringe Ben<br>C.Travel                | 9             |   | Row Labels 🔻 Count   | of Budget Category |     |
| D.Supplies                              | 3             |   | A.Personnel          | 0 0,               |     |
| F.Other                                 | 12            |   | A.Personnei          | 11                 |     |
| H. Programs<br>J. Indirect              | 23            |   | B.Fringe Ben         | 9                  |     |
| Grand Total                             | 60            |   | C.Travel             | 1                  |     |
| 6 (G. 16)                               |               |   | C.Haver              | 1                  |     |
| Sum of Cost \$ b                        | y Budget      |   | D.Supplies           | 3                  |     |
| Row Labels - Sum                        |               | Ξ | F.Other              | 12                 |     |
| A.Personnel                             | 74700         |   |                      |                    |     |
| B.Fringe Ben<br>C.Travel                | 25683<br>6000 |   | H. Programs          | 23                 |     |
| D.Supplies                              | 2800          |   | I. Indirect          | 1                  |     |
| F.Other                                 | 27656         |   |                      | 1                  |     |
| H. Programs                             | 150000        |   | Grand Total          | 60                 |     |
| J. Indirect<br>Grand Total              | 70000         |   |                      |                    |     |
| Count of Detai                          |               |   |                      |                    |     |
| Row Labels 💌 Count of Detail            |               |   |                      |                    |     |
| A.Personnel                             | 11            |   |                      |                    |     |
| B.Fringe Ben<br>C.Travel                | 9             |   |                      |                    |     |
| D.Supplies                              | 3             |   |                      |                    |     |
| F.Other                                 | 12            |   |                      |                    |     |
| H. Programs                             | 23            |   |                      |                    |     |
| J. Indirect<br>Grand Total              | 59            |   |                      |                    |     |

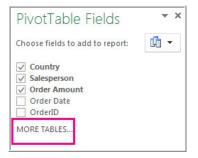
5. Tap or click **OK** to choose a selected sample. Excel places the PivotTable on a new worksheet and shows the **Field List** so you can further rearrange the PivotTable data as needed.

### Use multiple tables in your data analysis

The new Excel Data Model enables you to tap into powerful analysis features that were previously only available by installing the PowerPivot add-in. In addition to creating traditional PivotTables, you can create PivotTables based on multiple tables. And by importing different tables and creating relationships between them, you can analyze your data with results that you can't get from traditional PivotTable data.

# Use one Field List for different types of PivotTables

You can use the same **Field List** in Excel 2013 to create the layout for a PivotTable that uses one table or multiple tables. The **Field List** makes it easier to find the fields you want in your PivotTable layout, switch to the new Excel Data Model by adding more tables, and explore and navigate to all tables.



### Quick explore

You can explore different cuts and views of your data with one click and discover new insights hidden in your data. With one click, you can also conduct a cross-tab analysis of large datasets and get a 360-degree view of what your data can show you.

### Trend analysis

If you want to try to predict future trends, a good place to start is to look at the historical time series data. With Excel 2013, you can pull up a chart showing the trend based on the historical data.

### Connect to new data sources

To use multiple tables in the Excel Data Model, you can connect to and import data from additional data sources into Excel as tables or PivotTables. For example, you can connect to data feeds like OData, Windows® Azure® DataMarket, and SharePoint® data feeds. You can also connect to data sources from additional OLE DB providers.

### Create relationships between tables

When you have data from different data sources in multiple tables in the Excel Data Model, creating relationships between those tables makes it easy to analyze your data without having to consolidate it into one table. By using Multidimensional Expression (MDX) queries, you can further leverage table relationships to create meaningful PivotTable reports.

### Use a timeline to show data for different time periods

A timeline makes it easier to compare your PivotTable or PivotChart data over different time periods. Instead of grouping by dates, you can simply filter dates interactively or move through data in sequential time periods (like month-to-month performance) with just one tap or click.

|    | A                  | В               | С           | D         | E           | F | G         | н       | 1       | J | К     | L   |
|----|--------------------|-----------------|-------------|-----------|-------------|---|-----------|---------|---------|---|-------|-----|
| 1  |                    |                 |             |           |             |   |           |         |         |   |       |     |
| 2  |                    |                 |             |           |             |   |           |         |         |   |       |     |
| 3  | Sum of SalesAmount | Column Labels 💌 |             |           |             |   | Transacti | onDate  |         |   |       | Τ.  |
| 4  | Row Labels 🛛 👻     | Accessories     | Bikes       | Clothing  | Grand Total |   | 2008 - 20 |         |         |   | YEARS |     |
| 5  | Australia          | 53606.81        | 6267909.124 | 26409.8   | 6347925.734 |   | 2008-20.  |         |         |   | TEARS | × _ |
| 6  | Canada             | 39920.79        | 1189852.062 | 19083.47  | 1248856.322 |   |           |         |         |   |       |     |
| 7  | France             | 23362.15        | 1605597.614 | 11184.15  | 1640143.914 |   | 2008      | 2009 20 | 10 2011 | L |       |     |
| 8  | Germany            | 23303.36        | 1715407.248 | 8392.94   | 1747103.548 |   |           |         |         |   |       | _   |
| 9  | United Kingdom     | 30711.54        | 2062257.141 | 12768.18  | 2105736.861 |   | •         |         |         |   |       | Þ   |
| 10 | United States      | 98550.77        | 5698193.631 | 48911.94  | 5845656.341 |   |           |         |         |   |       |     |
| 11 | Grand Total        | 269455.42       | 18539216.82 | 126750.48 | 18935422.72 |   |           |         |         |   |       |     |
| 12 |                    |                 |             |           |             |   |           |         |         |   |       |     |
|    | < → Timeline       | Power View      | Customer    | Sales P   | roduct      | + |           |         |         |   |       |     |

### Use Drill Down, Drill Up, and Cross Drill to get to different levels of detail

In earlier versions of Excel, drilling down to different levels of detail in a complex set of data wasn't an easy task. Custom sets were helpful, but finding them among a large number of fields in the **Field List** took time. In the new Excel Data Model, you can navigate to different levels more easily.

- Use **Drill Down** in a PivotTable or PivotChart hierarchy to see granular levels of detail.
- Use **Drill Up** to go to a higher level for "big picture" insights.
- Use **Cross Drill** to navigate from one hierarchy to another to get insights about data across one or more hierarchies.

### New Excel functions

You'll find several new functions in the math and trigonometry, statistical, engineering, date and time, lookup and reference, logical, and text function categories. Excel 2013 also includes a few Web service functions for referencing existing Representational State Transfer (REST)-compliant Web services.



## Use OLAP calculated members and measures

With Excel 2013, you can tap into the power of self-service Business Intelligence (BI) and add your own MDX-based calculations in PivotTable data that is connected to an Online Analytical Processing (OLAP) cube. You don't have to use the Excel Object Model—you can create and manage calculated members and measures directly through Excel.

### Create a standalone PivotChart

With Excel 2013, a PivotChart no longer has to be associated with a PivotTable. A standalone or de-coupled PivotChart enables you to experience new ways of navigating to data details by using the new **Drill Down**, **Drill Up**, and **Cross Drill** features. It's also much easier to copy or move a de-coupled PivotChart.

### PowerPivot add-in

The PowerPivot data analysis engine is built into Excel 2013 so that you can build simple data models directly in Excel. The PowerPivot add-in provides an environment for creating more sophisticated models. Use it to filter out data when importing and to define your own hierarchies, calculation fields, and key performance indicators (KPIs). You can use the Data Analysis Expressions (DAX) language to create advanced formulas.

### Power View

Use the **Power View** is button on the **Insert** tab to compile data, charts, and graphs in a single view to bring your data to life. Discover insights about your data with highly interactive and powerful data exploration, visualization, and presentation features that are easy to apply. Use Power View to create and interact with charts, slicers, and other data visualizations in a single sheet.



### Spreadsheet Inquire add-In

The new Inquire add-in helps you analyze and review your workbooks to understand their design, function, and data dependencies, and to uncover a variety of problems including formula errors or inconsistencies, hidden information, broken links, and others. Using the Inquire add-in, you can start a new Microsoft Office tool called Spreadsheet Compare to compare two versions of a workbook and identify where changes have occurred.

#### Strict converter for new file format

With Excel 2013, you can save to and open files in the new Strict Open XML Spreadsheet (\*.xlsx) file format. With this file format, you can read and write ISO8601 dates to resolve a leap year issue for the year 1900.

### Touch

Excel 2013 is designed for touch as well as mouse and keyboard, so you can use your fingers and hands to move through your charts, graphs, and tables on Windows 8 devices and touch-enabled Windows 7 computers.

If you want to enlarge the space between buttons on the ribbon to make it easier to select options with your fingers, you can also use the new **Touch/Mouse Mode** button. You can add the **Touch/Mouse Mode** button to the Quick Access Toolbar so that you can switch back and forth between Touch and Mouse modes.

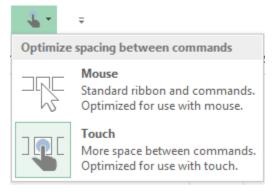
## Add the Touch/Mouse Mode button to the Quick Access Toolbar

1. Click the down arrow on the Quick Access Toolbar.

| -   |                             |
|-----|-----------------------------|
| Cus | tomize Quick Access Toolbar |
|     | New                         |
|     | Open                        |
| ~   | Save                        |

2. Tap or click **Touch/Mouse Mode**. The **Touch/Mouse Mode** button is added to the Quick Access Toolbar.

3. Tap or click the **Touch/Mouse Mode** button on the Quick Access Toolbar, and then select the mode you want.



# For more information

#### What's new in Excel 2013

http://office.microsoft.com/en-us/excel-help/what-s-new-in-excel-2013-HA102809308.aspx?CTT=1

Excel 2013 Quick Start Guide <u>http://office.microsoft.com/en-us/support/excel-2013-quick-start-</u> guide-HA103673690.aspx?CTT=1

#### Create your first Excel 2013 workbook

http://office.microsoft.com/en-us/support/create-your-first-excel-2013-workbook-RZ102925073.aspx?CTT=1

### Version compatibility between PowerPivot Data Models in Excel 2010 and Excel 2013

http://office.microsoft.com/en-us/excel-help/version-compatibilitybetween-powerpivot-data-models-in-excel-2010-and-excel-2013-HA103929426.aspx?CTT=1

#### Make the switch to Excel 2013

http://office.microsoft.com/en-us/excel-help/make-the-switch-toexcel-2013-RZ102924304.aspx?CTT=1