

Excel 2007: Charting

Learning Guide

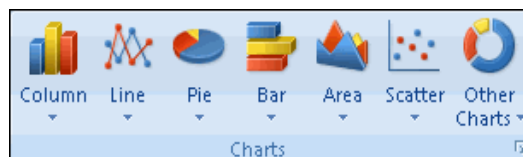
Creating a Chart

Creating a Chart with the Chart Wizard

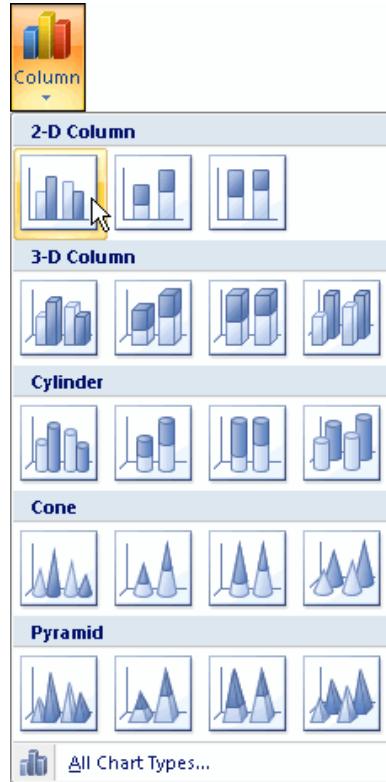
- Select the data you wish to chart, including any column or row headings.

	A	B	C	D	E
1		Smith-Wesson Associates			
2					
3	Month	Total Expenses	Gross Revenue	Net Revenue	
4	January	\$15,332.00	\$62,459.00	\$47,127.00	
5	February	\$15,822.00	\$44,951.23	\$29,129.23	
6	March	\$14,483.00	\$36,068.40	\$21,585.40	
7	April	\$18,933.00	\$46,077.61	\$27,144.61	
8	May	\$59,394.00	\$37,221.64	-\$22,172.36	
9	June	\$15,556.00	\$33,828.56	\$18,272.56	
10	July	\$17,069.00	\$31,068.90	\$13,999.90	
11	August	\$9,025.69	\$73,970.25	\$64,944.56	
12	September	\$14,890.00	\$47,868.23	\$32,978.23	
13	October	\$16,040.00	\$38,198.25	\$22,158.25	
14	November	\$16,711.00	\$41,539.36	\$24,828.36	
15	December	\$17,935.00	\$37,133.23	\$19,198.23	
16					
17					

- Locate the **Charts** area of the **Insert** ribbon.



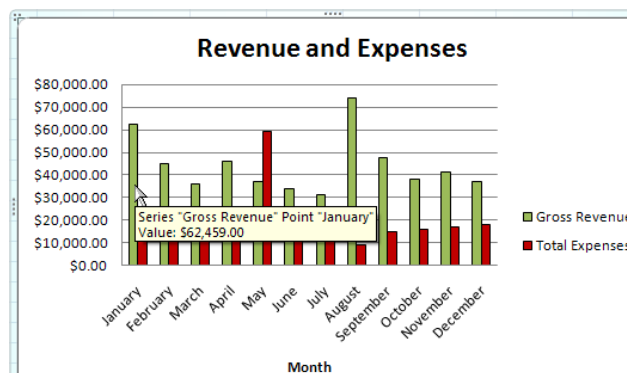
- Click on the down-facing arrow of the button labeled with the type of chart you wish to make (for example, Column)
- From the menu that appears, click on the thumbnail of the sub-type that you wish to use for your chart (for example, 2-D Column)



- Excel will automatically insert your chart into the current worksheet.

Reading a Chart

Excel makes it easy to learn more about a chart. Whenever you place your mouse over a chart element, Excel will temporarily display information about that element in a yellow box that hovers over your chart. Use this technique to discover the value of a data point, learn more about a data series, or to easily identify a chart element.



Customizing your chart with the Chart Tools ribbons

You may need to make some changes to the data or appearance of your chart. The **Chart Tools** ribbons provide the tools to customize your chart.

- In order to use the following tools, you **MUST** first click on your chart to make the ribbons available.
- After clicking on your chart, verify that these ribbons are available (at the far right of the ribbon menu).

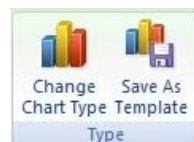


The Design ribbon

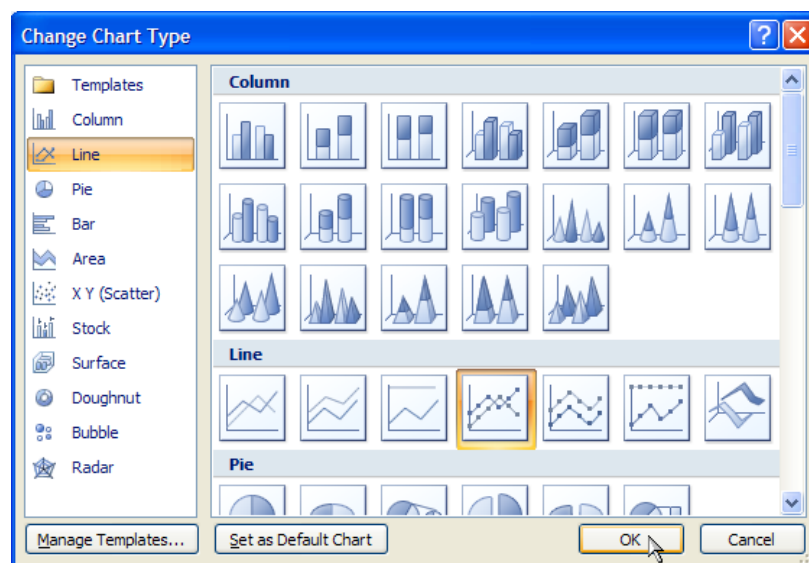
Chart Type

If you wish the type of chart you are using:

- Locate the **Type** area of the **Design** ribbon.
- Click on the **Change Chart Type** button.



- The **Change Chart Type** window will appear. From the menu on the left, click on the new chart type. Select the appropriate subtype in the pane to the right and click **OK**.



If you wish to save the settings of your chart for future use:

- From the **Type** area, click on the **Save As Template** button. The **Save Chart Template** window will appear.
- Save your template with an appropriate name.

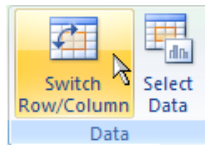
If you wish to use this template to insert a chart:

- Locate the **Charts** area of the **Insert** ribbon and click on the **Other Charts** button.
- Click on **All Chart Types**.
- The **Change Chart Type** window will appear. From the menu on the left, click on **Templates**.
- Click on the thumbnail describing your chart and click **OK** (placing the cursor over the thumbnail will reveal the name you gave it).

Changing the data on your chart

To switch your row and column data:

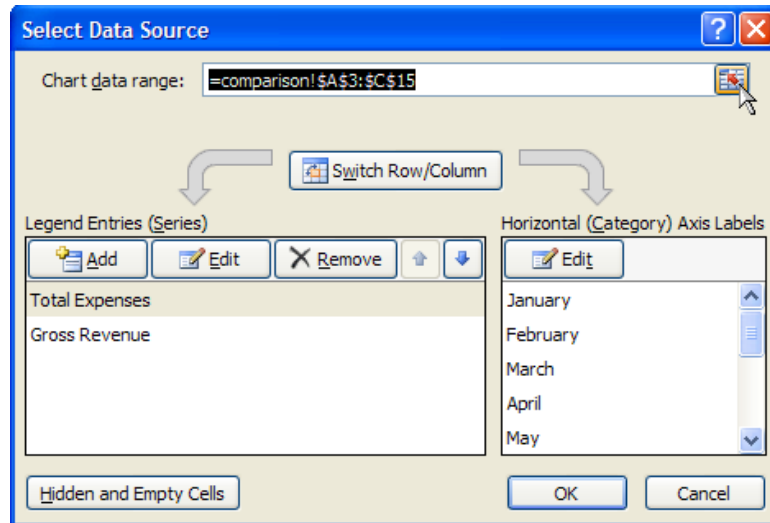
- Go to the **Design** ribbon. From the **Data** area, click on the **Switch Row/Column** button.



- Excel will now treat the rows of your data as columns and vice versa. Your chart will reflect these changes.

To change the data ranges used for your chart:

- Go to the **Design** ribbon. From the **Data** area, click on the **Select Data** button.
- The **Select Data Source** window will appear.



- Click on the data range button in the top right corner to select a new data range.
- You can also add, edit, or delete legend entries (series) by using the **Legend Entries** buttons on the left.
 - You can also change the order of how series are displayed by using the up and down arrows to the right of these buttons.
- You can also change the labels being used by clicking on the **Edit** button in the **Horizontal (Category) Axis Labels** regions.

Chart Layouts

To change your chart layout:

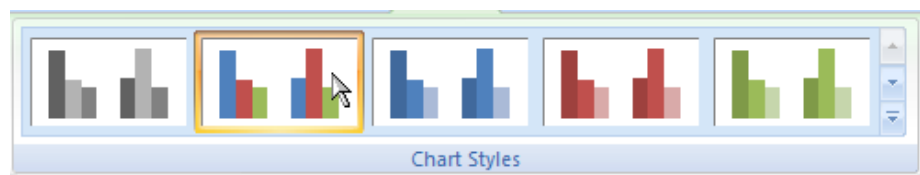
- From the **Design** ribbon, go to the **Chart Layouts** area.
- Scroll through the thumbnails of layouts to find a suitable layout and click on that thumbnail. Excel will apply this layout to your chart.



Chart Styles

To customize the color scheme of your series data:

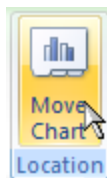
- From the **Design** ribbon, go to the **Chart Styles** area.
- Scroll through the thumbnails to choose a suitable chart style. Click on a thumbnail to apply that style to your chart.



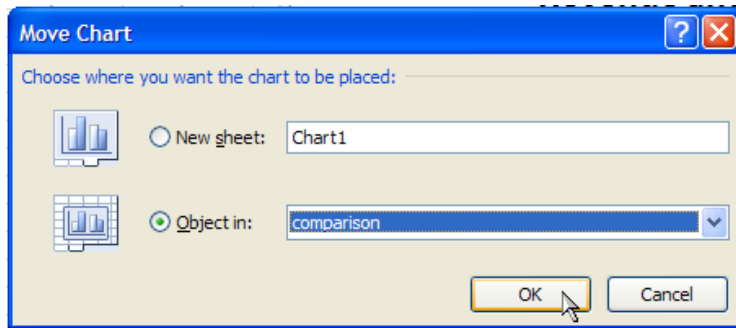
Moving your chart

If you need to move your chart to an existing sheet or a new workbook:

- From the **Design** ribbon, go to the **Location** area and click on the **Move Chart** button.



- The **Move Chart** window will appear.

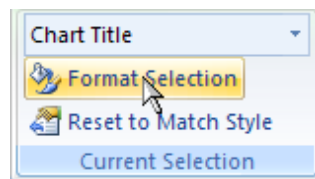


- Select an existing sheet to place the chart in or create a new sheet with a descriptive name.
- Click **OK** to save your changes.

The Layout ribbon

To customize the layout of any object of the chart:

- Select the chart object you wish to modify by clicking on it.
- Go to the **Layout** ribbon and locate the **Current Selection** area.
- The drop-down menu at the top should reflect the name of the chart object you wish to modify (i.e. Chart Title).
- Click on the **Format Selection** button.

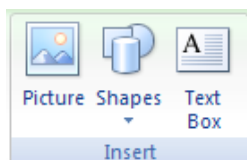


- The **Format (object)** window will appear. From here you can change the characteristics of the chart object.

Insert an Object into your chart

To insert an object (i.e. picture, shape, textbox) into your chart:

- From the **Layout** ribbon, locate the **Insert** area.
- Click on the button representing the object you wish to insert.

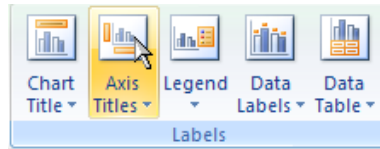


- Excel will allow you to insert the selected object in the chart area of the chart. Your object will remain confined to the chart area (unless you cut and paste).

Adding Labels to your chart

To add/modify labels for your chart:

- Go to the **Layout** ribbon and locate the **Labels** area.
- Click the button of the label you would like to add/modify (i.e. Axis Titles).

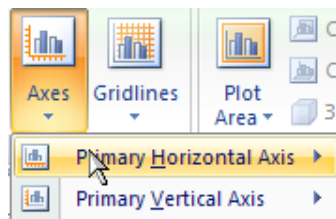


- From the resulting menu, decide how you want the label positioned.
- Excel will insert the label with a generic name. Click into the textbox to make your own name.

Change the positioning of your axes

To change how your axes are positioned:

- From the **Layout** ribbon, go to the **Axes** area and click on the **Axes** button.
- Choose the axis you wish to modify (Horizontal or Vertical).

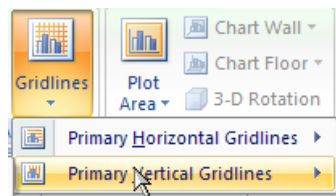


- From the resulting menu, choose how you want your axis displayed.

Gridlines

By default, Excel displays major horizontal grid lines, and does not show vertical gridlines. To modify this:

- From the **Layout** ribbon, go to the **Axes** area and click on the **Gridlines** button.
- Choose the axis gridlines you wish to modify.

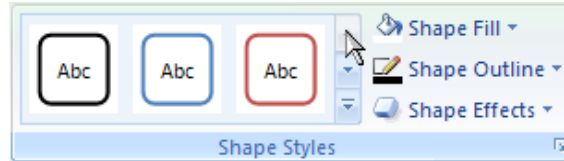


- From the resulting menu, choose how you want the axis gridlines displayed.

The Format ribbon

To change the color of a series in your chart:

- Click on a member of the series (all members should be highlighted).
- From the **Format** ribbon, go to the **Shape Styles** area.



- Excel provides some default styles for you to choose from. Click on the style's thumbnail to apply it to your series.
- If none of these default styles appeal to you, use the buttons on the right to customize your series.
 - To change the fill color of your series object, click on the **Shape Fill** button and pick the fill color of the series.
 - To change the outline color of your series object, click on the **Shape Outline** button and pick the outline color of the series.
 - To add an effect (i.e. shadowing, glow, 3-D) to your series object, click on the **Shape Effects** button and pick the effect you wish to apply to your series.

To change the color or appearance of labels in your chart:

- Click on the textbox containing the text you wish to modify. You should see silver orbs highlighting the textbox.
- From the **Format** ribbon, go to the **WordArt Styles** area.

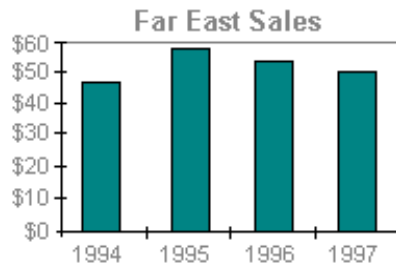


- Similar to the **Shape Styles** area, you can either choose a predefined style from the given list or use the three buttons on the right to define fill color, outline color, or text effects.

Types of Charts

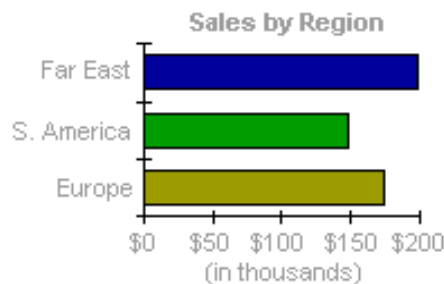
Column

Column charts show variation over a period of time or illustrate comparisons between items. The subtypes *stacked* and *100-percent stacked* column charts show relationships to a whole.



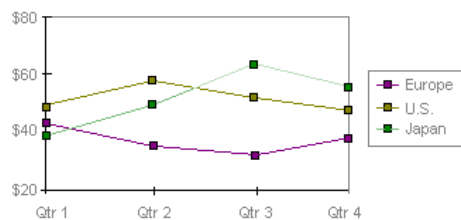
Bar

Bar charts show individual figures at a specific time or illustrate comparisons between items. The subtypes *stacked* and *100-percent stacked* bar charts show relationships to a whole. This type of organization places more emphasis on comparisons and less emphasis on time.



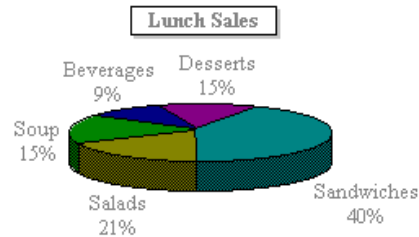
Line

Line charts show trends or changes in data over a period of time at even intervals. Line charts emphasize time flow and the rate of change, rather than the amount of change or magnitude of values.



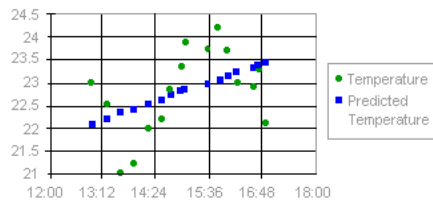
Pie

Pie charts show the relationship or proportions of the parts to the whole. A pie chart contains only a single data series. If you select more than one data series when you create a pie chart, only one data series will be displayed. To display more than one data series in a round chart format, use the doughnut chart type.



Scatter

An x-y (scatter) chart shows the relationship or degree of relationship between the numeric values in several chart data series or plots two groups of numbers as one series of xy coordinates. Xy charts are most commonly used for scientific data. When creating an xy chart, the data must be arranged with the x values in one row or column, followed by one or more corresponding y values in the adjacent rows or columns.



Area

Area charts show the relative importance of values over a period of time. Although area charts are similar to line charts, area charts emphasize the amount of change or magnitude of values, rather than time and the rate of change.

