



QUICKSTEPS

WORKING WITH CHARTS

Charts are highly flexible, and you can easily change several of their characteristics.

RESIZE A CHART

1. Click the chart. Eight sizing handles (sets of faint dots in the corners and middle of each side) appear on the expanded border of the chart area.
2. Point to a sizing handle. The mouse pointer becomes a double-headed arrow.
3. Drag to increase or decrease the chart size. The plot area changes accordingly.



POSITION A CHART

You can move a chart to other programs by other means (the Cut and Move Chart commands), but to adjust its location within the Excel window, it's generally easier to simply drag it into the position you want.

1. Click the chart.
2. Point to the chart border (but not to a sizing handle). The mouse pointer becomes a cross with four arrowheads.
3. Drag the chart into the position you want.

REMOVE A CHART

When removing a chart, make sure you click or right-click the chart area, not a chart element (verify this by clicking the **Format** tab (Chart Tools) and seeing Chart Area displayed in the Current Selection group).

Click the chart area, and press **DELETE**.

—Or—

Right-click the chart area, and click **Cut**.

INSERT A CHART SHEET

1. Right-click the worksheet tab to the right of where you want the new chart sheet, and click **Insert**.

Continued . . .

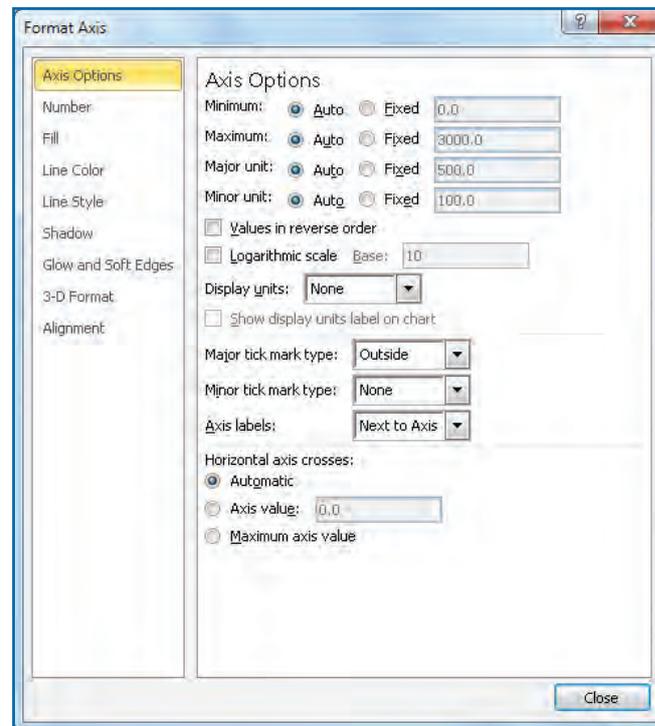


Figure 6-15: You can get very detailed when making manual formatting changes.

Use Charts

Charts can be moved, copied, printed, and enhanced with shapes, pictures, and text, and analyzed with trendlines, standard deviation indicators, and—new to Excel 2010—sparklines.

Add Charts Elsewhere

Charts used within Office 2010 programs (Microsoft Excel, Microsoft Word, and Microsoft PowerPoint) appear and behave almost identically, allowing you to easily share information among the three programs.



QUICKSTEPS

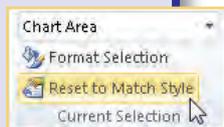
WORKING WITH CHARTS *(Continued)*

2. In the Insert dialog box General tab, double-click the **Chart** icon. The chart sheet is inserted and is named “Chart x.”
3. Add a chart to the new chart sheet. (See “Choose a Chart Location” and “Add Charts Elsewhere” in this chapter for ways to move and copy charts.)

REVERT A CHART'S STYLING

Sometimes you can get carried away with visual customizations and want to start over with a basic appearance. You can quickly remove styling changes and reset a chart or individual elements to match the attributes of the workbook's theme.

1. Click the chart or chart element you want to revert.
2. In the Format tab (Chart Tools) Current Selection group, click **Reset To Match Style**.
–Or–
Right-click the chart and click **Reset To Match Style**.



NOTE

When charts are copied or moved within Excel (except when using the Picture paste option), a relationship is maintained with their underlying worksheet data. Charts and underlying data tables in the same workbook are updated according to your calculation settings in the Excel Options Formulas and Advanced areas. When charts and their underlying data are in different workbooks, updates occur just as when they are in the same worksheet—if all workbooks are open. Charts in closed workbooks are updated when you next open them.

MOVE AND COPY A CHART WITHIN EXCEL

You can relocate both embedded charts and charts that have been placed on their own chart sheets. Any changes to the underlying data will be updated in the chart, according to calculations options selected for the workbook (see Chapter 4 for more information on recalculating).

1. Right-click the chart and click **Cut** to move it.

–Or–

Click **Copy** to copy the chart.

2. Right-click the upper-leftmost cell where you want the chart, either in the same or another workbook, and click one of the three paste options:



- **Keep Source Formatting** copies the theme and formatting from the worksheet where the chart originated.
- **Use Destination Theme** applies the theme of the destination worksheet to the chart.
- **Picture** takes a snapshot of the chart in the originating worksheet and pastes it as a graphic in the destination worksheet. Chart data and elements lose their association with the originating worksheet.

USE CHARTS IN WORD AND POWERPOINT

Excel is primarily a data collection and analysis program; Word and PowerPoint present data and other information. You can use Office 2010 to achieve the best of both worlds by using Excel to collect, retain, and manipulate the data and copying the charts to Word and PowerPoint for use in documents and presentations. You have several options as to the relationship between the data in Excel and the charts in other programs.

1. In Excel, right-click in a blank area of the chart, and click **Copy** (or use one of several alternative copying techniques).
2. Open Word 2010 or PowerPoint 2010. Click where you want the Excel chart inserted, and in their respective Home tab Clipboard group, click the **Paste** down arrow.

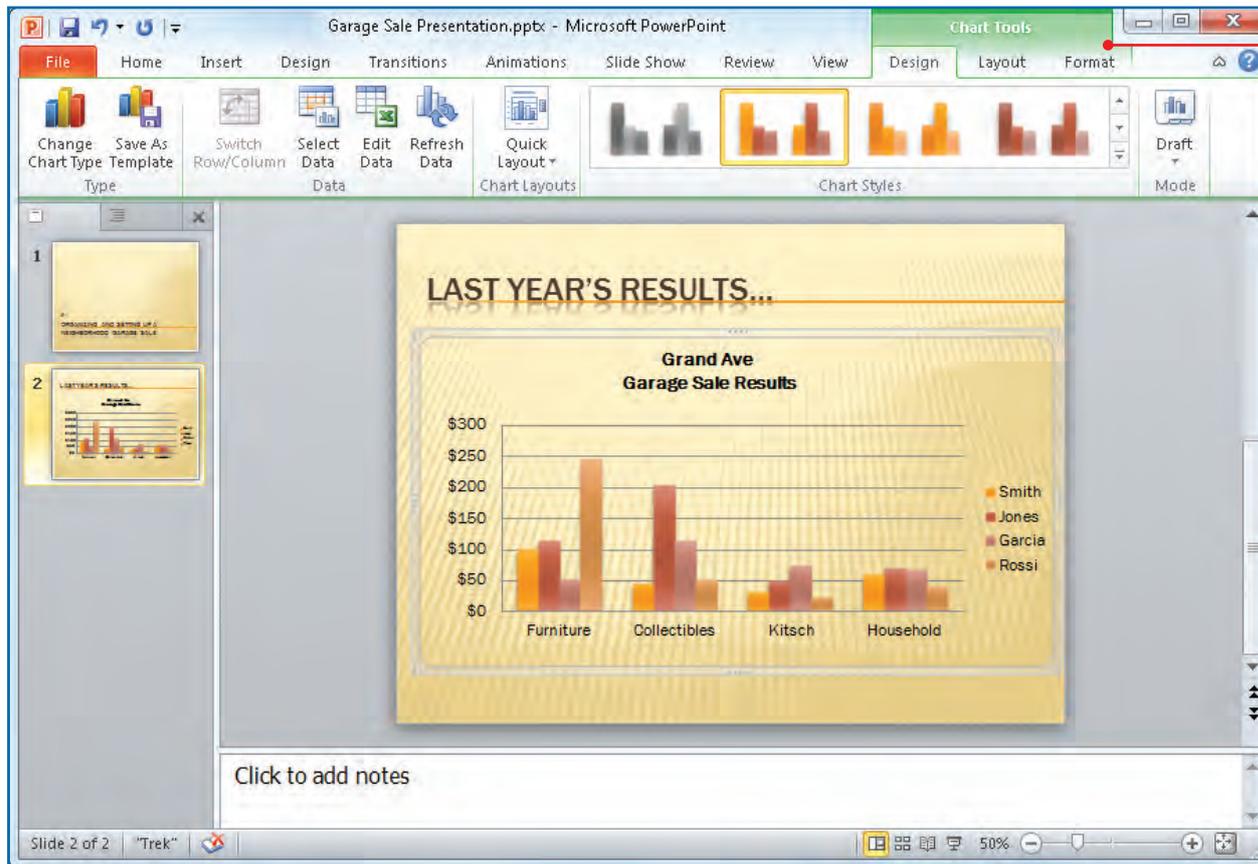


TIP

Besides copying and pasting Excel charts into Word and PowerPoint, you can copy charts into many other programs using the paste option available within each program. The results will be similar to using the Picture paste option, that is, a static snapshot of the chart.

3. Click one of the paste options, as described next. The chart will appear in Word or PowerPoint as it did in Excel, shown in Figure 6-16.

- **Keep Source Formatting** copies the chart as it appears in Excel.
- **Use Destination Theme** resets the chart's styling to match the current theme in Word or PowerPoint, providing a more unified look.



A familiar set of charting tools awaits your pasted chart in Word or PowerPoint

Figure 6-16: Charts are easily copied from Excel to Word and PowerPoint, where you can link to the data and use charting tools to modify the formatting.



TIP

In the vein of “too much of a good thing,” your formatting can become so onerous that the speed at which the chart refreshes, or redraws, itself can be adversely affected, especially when linked to other programs. To compensate for this sluggishness, you can display your charts in Draft mode, which increases the refresh rate by removing screen-intensive formatting, such as chart area fills. To change modes, on the Design (Chart Tools) tab, click the **Draft** down arrow in the Mode group, and select the mode (Draft or Normal) and whether to apply a mode to all charts.

- **Link And Keep Source Formatting** copies the chart with the formatting, styles, and themes from the Excel workbook and maintains a link with the source workbook so that changes made to the data are updated in the Word or PowerPoint chart as well (assuming the link isn’t broken by removing the workbook or deleting the data). Updates are made automatically when both source and destination documents are opened, unless default settings have been changed.
- **Link And Use Destination Theme** copies the chart and applies the theme of the destination document or slide and maintains a link with the source workbook so that changes made to the data are updated in the Word or PowerPoint chart as well (assuming the link isn’t broken by removing the workbook or deleting the data). Updates are made automatically when both source and destination documents are opened, unless default settings have been changed.
- **Picture** inserts the chart as a standalone picture. No changes to the structure are allowed by the destination program, and no data updates are provided by Excel.

Analyze Charts

“Past performance does not guarantee future results,” as the saying goes, but Excel can analyze plotted data to predict possible trends, show differences in data series, point out high-low values (see Figure 6-17), and show errors. However, not all analysis tools are available for all chart types. Table 6-3 shows which tools are available for specific chart types. The more common analysis tools are described next.

ANALYSIS CHARTING TOOLS	AVAILABLE CHART TYPES AND SUB-TYPES
Trendlines	Column, Bar, Line, 2-D, Stock, XY, Bubble (no stacked charts)
Drop Lines	Area, Line
High-Low Lines	2-D Line
Up/Down Bars	Line, Stock (added by default to stock charts)
Error Bars	Column, Line, Stacked, Bar, Area, XY, Stock, Bubble

Table 6-3: Available Analysis Charting Tools