Excel Charts

Data Preparation
Labels must be directly above or to the left of data. No spaces (empty rows or columns) between labels and data!

Chart Creation Process
Note: Labels must be directly above or to the left of data. No spaces (empty rows or columns) between labels and data!
1. Select labels and data on worksheet.
2. On the Insert tab, in the Charts group, select a chart. Chart will appear on the current worksheet.
3. Optional: With chart selected, use the Design, Layout and Format tabs to modify chart. (See options below)
4. Optional: On the Design tab, click Move Chart to relocate to a different or new worksheet

Chart Types
- Column/Bar – compare values across categories
- Hierarchy – compare parts to a whole
- Waterfall/Stock
- Line/Area – display trends over time
- Statistic – show statistical analysis of data
- Combo – display widely varied or mixed data types
- Pie/Doughnut – display contribution of values to the whole
- Scatter/Bubble – (a.k.a. XY Chart) compare pairs of values
- Surface/Radar

Position Chart
1. Click any blank area inside the chart.
2. Drag chart to new location.

Change Chart Type
1. Select the chart.
2. On the Design tab (Type group), click Change Chart Type.
3. Select the desired chart type.

Resize Chart
1. Point to the desired sizing handle (at corners and midsections of chart).
   The pointer changes into a black, double-headed arrow.
2. Drag the sizing handle to the desired location.

Delete Chart
1. Select the chart.
2. Press [Delete].

Editing Chart

Change Plot Direction
1. Select the chart.
2. On the Design tab (Data group), click Switch Row/Column.

Remove/Add & Position Legend
1. Select the chart.
2. On the Design tab, click Add Chart Element.
3. Point at Legend and then select the desired legend option.
Chart Non-adjacent Ranges
1. Select the first range to chart.
   IMPORTANT! Include labels as well as data.
2. Hold [Ctrl] and select non-adjacent ranges.
3. Continue creating chart as normal.
   (Steps 2-4, “Chart Creation Process” above)

Change Chart Type
1. Right click on the chart.
2. Select Change Chart Type from the shortcut menu.
3. Select the desired type and then click OK.

Rotate Chart
1. Right-click on the chart.
2. Select 3-D Rotation from the shortcut menu.
   The Format Chart Area pane will open on the right.
3. Change Rotation values as desired.

Format Individual Chart Elements
1. Select the individual chart element.
   Selecting some elements may require multiple single mouse clicks.
2. Right-click on the selected element.
3. From the shortcut menu, select Format element-name…
   where “element-name” is the name of the selected element.
   The Format pane will open on the right.
4. Select changes from the dialog box.

Change Chart Location
1. Select the chart.
2. Click Move Chart on the Design tab (Location group).
3. Select the new location, and then click OK.

Change Chart Title Text
1. Right-click on the chart title.
2. Select Edit Text.
3. Type the new text; when done, click away from the title.

Chart Objects & Descriptions

<table>
<thead>
<tr>
<th>Object</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart area</td>
<td>The entire area within the chart border, including the chart itself and all related elements.</td>
</tr>
<tr>
<td>Category axis (x axis)</td>
<td>The axis that contains the categories being plotted. It is usually the horizontal axis.</td>
</tr>
<tr>
<td>Chart title</td>
<td>Text describing the chart; it is automatically centered and placed at the top of the chart.</td>
</tr>
<tr>
<td>Series markers</td>
<td>Graphic elements that make up your data plot, such as bars or lines. The chart tip names each series using the name displayed in the legend.</td>
</tr>
<tr>
<td>Plot area</td>
<td>The area in which Excel plots data.</td>
</tr>
</tbody>
</table>

Object          | Description                                                                 |
-----------------|-----------------------------------------------------------------------------|
Gridlines       | Lines that extend from an axis across the plot area to help guide the eye from the data point to its corresponding value. |
Value axis (y axis) | The axis that contains the values being plotted. It is usually the vertical axis. |
Legend           | Describes the data series being plotted.                                     |
Data points      | The individual parts of a data series. Data points can be bars, points on a line, a slice of a pie, a circle, etc. Data points are identified in chart tips by the series name and the value of the data point. |