



INTRODUCTION TO MS EXCEL

Part 3

[Abstract](#)

Part 3 of the training course covers Excel Charts.

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Introduction to Microsoft Excel – Part 3

Excel Charts

There are a variety of different chart types preprogrammed within Excel. You have Line charts, Pie charts, Bar charts, Column charts and others.

First we are going to start by creating a chart, formatting it and then also modifying it to make it look better.

We will give some tips and tricks to make your charts more effective.

I have created an example Workbook which we will use to create the charts from. You can follow along using this workbook.

Here we have example data in table format which we can use to create our charts.

If you just look at the data, it isn't easy to analyse just by looking at it, but if you turn it into a chart then you can appreciate what the data is telling you.

To insert a chart, highlight all the data that you want to use and select the headers you want to use. Notice that there is a totals row at the bottom. We are not going to use that as it spoils the shape of the chart.

With all the data selected, Click on the Insert tab, notice in the middle of the pane there is a category for charts. Notice the tab for Recommended Charts.

Excel will always recommend the best chart for the data highlighted.

You can choose another type of chart if you want to, but recommended charts usually work best.

Click on Recommended Charts, this opens up the Insert Chart Dialogue. You can see all the different types of chart that Excel recommends based on your data.

The selected recommendation is a Line Chart. The Preview shows you what the Line chart will look like with your data.

You can see that January is a poor month for sales after the Christmas binge, but they grow as the year advances.

On the left hand side of the preview you can see a whole range of other types of chart which you could select. For example, the next one down shows a line chart with data points shown. We also have a Column chart, an Area chart and then also a Funnel chart which is probably not so good for this particular data set.

Up at the top of the preview pane we can Click on the All charts view. Within the All Charts view, over on the left you will see all the different types of charts again. There are 17 different chart types available. When you click on a chart type, it gives you a preview of what that chart would look like.

If you select a Column chart, at the top, there are different types of Column chart including 3D options.

The left hand list of charts shows the 4 most popular ones at the top of the list. The ones shown below are more specialised, designed for particular jobs.

Click into the Line chart. The preview shows you an example of that chart. When you hover over the chart, you get a larger version of the chart using your data. A standard

Line chart will work with our data, so Click OK. This will insert the line chart into your spreadsheet. Notice that all the data creating the line chart is highlighted to show where the chart came from.

It's easy if you want to change the range of data used. Say you just want the first 3 months of the year. Go down to the bottom of the data selection and pull the bottom line up so that only the first 3 months is selected. The chart automatically changes so that only 3 months are shown.

If you wanted to look at the last 3 months of the year, you click on the data selection and drag it down to show just the last 3 months. But we don't want to do that, so let's select all the data again.

Excel will allow you to select non contiguous blocks of data, Let's say just want to look at January to March and October to December. Press the Control Key and select the first 3 months, then press the Control Key and select the last 3 months. Click on Insert and choose a Bar chart this time. This inserts a Column chart showing the first 3 months and the last 3 months. You probably wouldn't want to do this, but it does show what Excel will do.

Let's delete the chart by pressing the Delete Key and here we have a Line chart again. Although we have decided to go with a line chart, perhaps you would like a different type of chart. With line chart selected, we have a new option on the top tabs called Chart Design. Click into this and on the right hand side we have the option to Change the Chart Type. When you click on this, it opens a dialogue box where you can choose from all the different chart types.

Let's say that we want to go with a Column chart. Let's select this and Click OK and this changes the type of chart.

Now that we have inserted a basic chart, next let's look at a faster way to insert charts. Select the Biscuit sales chart and delete it. Now highlight all the data that you want to use. Just press Alt + F1 and magically we have our chart again.

By default, pressing Alt + F1 will insert a Column chart, but let's say that you want to change that default. On the top bar Click on Change Chart Type.

In the dialogue box, select the Line chart, then select the type of line chart that you want to set as the Default, then Right Click on it and select Set As Default..

Let's delete the chart again and look at another keyboard shortcut.

Highlight all the data as before, then press the F11 key which inserts a chart. By default it inserts a Line chart because that's what we set as the default.

The chart is currently floating on its' own separate sheet of the workbook. If you want to position the chart next to the data, then up at the top within the Charts Design tab, select Move Chart and a dialogue pops up asking where to move the chart to.

Select, Object In – Line chart sheet and Click OK.

The chart will move to the sheet with the data in it.

Next, let's look at modifying your chart. Let's change the Title of the chart from Biscuit Sales to Arthur's Biscuit Sales 2026. To do this, simply click on the Title, then you can edit the text.

A cunning trick is to create a dynamic title. To do this, select the Title, then type in the Formula Bar

=A1. This refers to a cell in your data. Hit Enter and the title is taken from the data on your spreadsheet.

Notice that if you change the data in cell A1, then the title updates to reflect it automatically.

We can improve the understandability of the chart by giving the vertical axis a label. Click on the chart and on the right hand side there are three different squares. At the top we have a square with a plus in it. Click on it and it shows you all the possible elements of a chart.

It is possible to add or subtract elements of a chart individually just by turning them on or off,

We want a label alongside the vertical axis. There is a box called Axis Titles. Note that there is an expansion arrow to the right. If you click the arrow, this pops up a Selection Box with Primary Horizontal and Primary Vertical, so check the Primary Vertical box and you get the label on your chart.

If you are unsure what a chart element looks like, just hover over the description and you get a preview of that element.

Say that we want to add a Trendline to the chart.

Go to the plus box on the right and Click. Notice that there is a checkbox for a Trendline. Just Click on it and you will get a Trendline.

If we click on the Paintbrush Box, this gives access to all the style customisations. You can easily change the chart style.

If you hover over each of the chart styles, it will show you what that style will look like with your data.

On the top of the Style Box is a colour button. This adjust the colour of the text in your chart.

The third box down is a Filter Box. This enables you to select parts of your data, or Filter it.

If you Click on the Filter Box you can choose to select or deselect data points under the Categories Label, then simply Click Apply.

With the chart selected, two Tabs appear at the top called Chart Design and Format. If you click away from the chart, then these tabs disappear.

We have used Chart Design already, but let's click it to see what it does.

At the top you will see a whole range of different styles of Line Chart.

At the left hand side we have an Add Chart Elements button which does the same as the Plus Box we have already looked.

We also have something called Quick Layouts which adds or removes different elements of your chart.

You can also change your chart colours and a whole range of different chart styles.

At the top, Click into Format.

Note that a whole bunch of new tools are displayed.

You can Click on each of you chart elements and change them individually, eg change the text size or the text colour.

Now that you have customised the basic chart, you can save all the various changes into a reusable Template.

If you Right Click on the customised chart, a dialogue box opens.

Click on the option Save As Template and now you can give the template a name.

Then Click on Save.

To show you how to use a Template, select your data and press the F11 Key.

Tis will create a new chart on a new sheet. Notice that all your customisations are missing. To correct this, select the chart and go up to Chart Design and then go to Change the Chart Type.

On the left hand side, the top button shows a folder of Templates. Find the Template that you created, Click on it and it applies the format that you created.

What if you want to adjust the range of the axes, or project forward with the Trendline?

To modify any of the specific elements, just Double Click on them. This brings up a Pane on the right hand side where you can change things.

You have a Paint Bucket, Shadow, adjust alignment and lastly we have some axes options.

We want to change the Axis Maximum to 80,000. Just edit the value shown.

To change the Trendline, Double Click on it and you get Trendline options. You see that it is currently set to a Linear Trendline.

Going down the Pane, you will see and option to Forecast Forward. If we set that to 12 periods, then hit Enter, the Trendline goes 12 periods forward.

If you want to delete the Trendline, just Click on it and press the Delete Key.

So far we have accepted the placement of the chart. To move the chart around the sheet, just click on it and drag it to where you want it and drop it there.

When you click on the chart, notice that Handles appear on the corners of the chart.

You can click on the handles to drag the size of the chart or change the aspect ratio of the chart. Be careful not to overdo this as you can lose meaning if you change the chart too much.

If you press the Shift Key whilst dragging a Handle, this will preserve the Aspect Ratio of the chart.

You can also press the Alt Key whilst dragging, this will lock the chart to the cell boundaries as you change the size of the chart.

THE END OF Part 3.