Excel 2013

Lesson 5 Notes--Charts

**Pie/Doughnut Charts & Formatting Chart Elements**

*\*Open from path: Datafile/CT2013/Excel 2013/Excel Practice Problems/Lesson 4 & 5 Practice Problem for Charting.*

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| **Pie/**  **Doughnut**  **Charts** | * A pie/doughnut chart compares the sizes of parts to a whole. * Each chart shows only one data series. * They are useful when you want to emphasize a significant element. * You may have to hide a column in order to make a pie/doughnut chart work OR * You can select non-adjacent columns by holding down the CTRL key.   NOTE: In selecting non-adjacent cells for pie/doughnut charts, hold down the CTRL key in selecting the second range only. Otherwise, your pie/doughnut charts will not display properly. |
| **Creating a Pie/Doughnut**  **Charts** | **To create a pie/doughnut chart:**   1. You create pie/doughnut chart the same way you create other charts. 2. Select the range of the chart that you need. (Remember, if these rows are not adjacent, you will need to hold down the CTRL key.) 3. Click on the Insert tab, Charts Group, then dialog box launcher for all chart options. 4. Choose the type of pie or doughnut chart that you want. |
| **Exploding Sections of a Chart** | * **Explode:** A piece of a pie chart that s disconnected from the rest of the pie.   You can choose a type of chart that already has sections exploded (pulled apart from the rest of the chart).  **You can also explode sections of a chart manually. To do this:**   1. Click the slice of the pie/doughnut you want to explode. 2. Drag the slice away from the center of the chart.   **You can also explode all slices of the chart. To do this:**   1. Select the entire pie/doughnut. 2. Drag away from the center. |
| **Formatting Chart Elements** | You can change many formatting elements on a chart. Some of these could include:   * Changing the background of the data markers * Changing the background of the plot/chart area and the chart floor/chart wall * Changing the chart colors * Changing the chart layout * Adding borders/shading/and effects to elements of the chart * Adding Data Labels to the chart * Adding styles to the chart * Adding shape style, effects, and outlines to the chart * Adding WordArt styles to the chart * Moving the legend to different areas of the chart |
| **Changing the Color Options** | You can change the color scheme or theme that appears for your chart:   1. On the *Page Layout* tab, click the *Colors* button, and pick the color set you want. 2. To create your own set of colors, click *Customize Colors*. 3. Click the button next to the theme color you want to change (for example, *Accent 1* or *Hyperlink*), and then pick a color under *Theme Colors*. 4. To create your own color, click **More Colors.** 5. Repeat this for all the colors you want to change. 6. In the *Name* box, type a name for the new theme colors, and click *Save*. |
| **Using the Chart Tools Conceptual Tool Bar to Format Chart Elements** | Changing the format on elements of a chart can be done usually in 4 different ways:   1. From the Contextual Tab Ribbons: 2. Select the area/element that you want to format. 3. Click the appropriate ribbon tab (Design or Format). 4. Choose the appropriate button from a group. 5. If necessary, make the appropriate choices from the dialog box. **OR** 6. From the Format Pane: 7. Double Click on the area/element that you want to format. 8. Click option in the Format Pane that appears. 9. Choose the appropriate feature. **OR** 10. From the Chart Buttons: 11. Choose one of the three formatting chart buttons that display at the right side of the chart border  * Chart Elements * Chart Styles * Chart Filters **OR**  1. From the Right-Click Options: 2. After selecting most chart elements, you can right click on the element to bring up the shortcut menu. You can then choose the formatting option you want from the shortcut menu. 3. You can also choose 3-D Rotation (which changes the viewpoint of the 3-D rotation of the chart) or to format the specific element you have selected by changing the background, border, color, and fill. |
| **Chart Tools Design Tab** | ***The following format choices can be found on the Design Tab:***  **Chart Layouts Group:**   1. Add Chart Element—from this button you can change the elements of some of the following on a chat: Axes, Axis Titles, Chart Title, Data Labels, Data Table, Gridlines, Legend, Lines, Trendline, and Up/down Bars. Don’t forget to view the *More Options* selection within each element to further customize your choices by displaying the format pane.  * Axes—changes the formatting and layout of each axis * Chart Titles—add, moves, or positions a chart title. You can position the title either:  1. Centered Overlay Title—centers the title within the chart area. 2. Above Chart—centers the title above the chart. 3. More Title Options—this opens a dialog box that allows you to add colors, borders, fills, alignment, and effects to your chart title area.  * Axis Titles—allows you to add titles to the X or Y axis. * Data Labels—allows you to add Data Labels of a value, percent, category name, or series name. It also allows you to choose a location/position for the Data Label. * Data Table—adds a data table to the chart. * Gridlines—turns the gridlines on/off. * Legend—allows you to move the legend to 7 different positions in the chart area. The *More Legend Options*opens a dialog box to allow you to add borders, fills, and colors to your legend area*.* * *NOTE: With pie charts you are only able to access the Chart Title, Data Labels, and the Legend.*  1. Quick Layout—this button contains 7 different predefined chart layouts that change the overall look of the chart and the position of the chart elements.   **Chart Styles Group:**   1. Chart Styles—used to change the overall visual style of the chart. 2. Chart Quick Colors—customize color and style of the chart.   **Data Group:**   1. Switch Row/Column—allows you to swap the axis, i.e. data being charted on the X-axis to now be charted on the Y-axis and vice versa. 2. Select Data—allows you to change the data range you have selected for the chart.   **Type Group:**   1. Change Chart Type—allows you to change the type of chart you have created.   **Location Group:**   1. Move Chart—you have two choices with this button. They are: 2. New Sheet—allows the chart to be displayed/printed on its own screen (without the worksheet). 3. Object In—allows the chart to be displayed/printed on the same screen as the worksheet. |
| **Chart Tools Format Tab** | **The following format choices can be found on the Format Tab:**  **Current Selection Group:**   1. Chart Elements Box—select a chart element to format. 2. Format Selection— launches a dialog box for the element that is currently selected. It then allows you to select the formatting options you want for that element. 3. Reset to Match Style—clears the custom formatting of the selected chart element.   **Insert Shapes Group:**   1. Insert Shapes—choose ready-made shapes to insert into your chart such as circles, squares, arrows, etc. 2. Change Shape—change the shape of the drawing, preserving all of the formatting.   **Shape Styles Group:**   1. Shape Styles—this option has 42 predefined styles that can be applied to any chart. The styles will change the colors used in the chart and plot area. 2. Shape Fill—fills the selected shape with a solid color, gradient, picture, or texture. 3. Shape Outline—specifies the color, width, and line style for the outline of the selected shape. 4. Shape Effects –applies a visual effect to a selected shape such as shadow, glow, reflection, bevel, soft edges, or 3-D rotation.   **WordArt Styles Group:**   1. WordArt Styles—Applies different effects to the titles (including axis titles) of your chart. You can change: 2. Text Fill—this adds a solid color, gradient, picture, or texture to your titles. 3. Text Outline—specifies the color, width, and line style for the outline of the WordArt. 4. Text Effects—adds a visual effect to the text such as shadow, glow, reflection, bevel, 3-D rotation, and transform.   **Arrange Group:**   1. Bring Forward—brings the selected object forward so that it is hidden by fewer objects that are in front of it. 2. Send Backward—sends the selected object backward so that it is hidden by the objects that are in front of it. 3. Selection Pane—shows the Selection Pane to help select individual objects and to change their order and visibility. 4. Align (icon)—aligns the edges of multiple selected objects. 5. Group (icon)—groups objects together so that can be treated like a single object. 6. Rotate (icon)—rotates of flips a selected object.   **Size Group:**   1. Shape Height—allows you to change the exact measurement for the height of a specific shape or picture. 2. Shape Width—allows you to change the exact measurement for the width of a specific shape or picture. |
| **Chart Filters** | This feature is used to edit what data points and names are visible on your chart. To use chart filters to show or hide data in your chart:   1. Click anywhere in your chart. 2. Click the **Chart Filters** button Chart Filters button next to the chart. 3. On the **Values** tab, check or uncheck the series or categories you want to show or hide. 4. Click **Apply**. |
| **Insert Tab** | You can insert the following components to your chart through the Insert Tab:   1. Picture—Inserts a picture from a file and places it on your chart. 2. Shapes—Inserts ready-made shapes on your chart. 3. Text Box—Inserts a text box on your chart page. |