

Training

Chart work

EXERCISE 1: CREATE A CHART

1. Click in cell A2, and then drag to cell D5 to select the data in those four rows and columns.
2. On the ribbon, click the **Insert** tab. In the **Charts** group, click **Column**, and then rest the pointer on the first column chart type on the left in the **2-D Column** section. Notice the ScreenTip that describes the chart type (**Clustered Column**) and says when to use it.



3. Click **Clustered Column**. A chart is inserted on the spreadsheet. It compares salespeople to each other, month by month. The names of the salespeople are in the chart legend, and the months are at the bottom of the chart.

EXERCISE 2: LOOK AT CHART DATA ANOTHER WAY

In this exercise change how the chart data is compared. You'll make the chart show how each salesperson's sales improved or declined month to month.

1. Click inside the chart. **Chart Tools** should appear on the ribbon.
2. On the **Design** tab, in the **Data** group, click **Switch Row/Column**.

Note the difference. Now the chart legend shows the months of the year, and the salesperson names are at the bottom of the chart. All the sales data for Hansen, for example, is displayed together, in one group of three columns representing each month. You can see all of Hansen's sales together, instead of displayed over three different groupings.

3. Now put the chart back to the way it was. In the **Data** group, click **Switch Row/Column**. Now Hansen's sales are again distributed across the chart, instead of being grouped in one **cluster** (hence the name clustered column chart).

EXERCISE 3: UPDATE CHART DATA

In this exercise you'll change the data in the worksheet and see how the chart automatically updates itself.

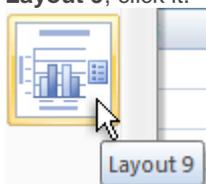
1. Click in cell D3.

2. Change the data from 500 to 800, and then press ENTER.
The column for Hansen in March is updated, growing taller. Also, the values on the vertical axis on the left changed, to adjust for the larger value added to the data.

EXERCISE 4: ADD TITLES

In this exercise you'll add chart and axis titles.

1. If necessary, click in the chart to display the **Chart Tools**. You may need to click the **Design** tab to display the commands.
2. On the **Design** tab, in the **Chart Layouts** group, click the **More** button  so that you can see all the layouts in the group.
3. As you rest the point over each layout, a ScreenTip is displayed with the name of each layout. When you get to **Layout 9**, click it.



Placeholders are inserted for Chart Title and for the vertical and horizontal Axis Titles.

4. At the top of the chart, either select all the placeholder text ("Chart Title") or just click "Chart Title" and type replacement text.
Type **Northwind Traders Tea**. Then click away from the text.
5. Now type the axis titles. At the bottom of the chart, select the horizontal placeholder "Axis Title." Type **First Quarter Sales**. Then click away from the text.
6. At the left side of the chart select the vertical placeholder "Axis Title." Type **Cases Sold**.

Note To revise text, just click inside the text, and make changes.

EXERCISE 5: CHANGE CHART LAYOUTS

In this exercise you'll see what some of the other chart layouts look like, and how chart elements are moved around in them.

1. Click inside the chart. If necessary, click the **Design** tab.
2. In the **Chart Layouts** group, click the **More** button  to see all the layouts.
3. Rest the pointer on the layouts until you get to **Layout 2**, and then click it.
This layout moves the legend to the top and removes the chart axes. It also removes the gridlines, which are the horizontal lines that extend from the value axis on the left across the chart to help you see the value of each of the columns.
The layout also adds data labels across each column that show the number of cases of tea sold by each person for each month. With data labels, you don't need gridlines.

4. Go back to **Chart Layouts**, click the **More** button  again, and locate and click **Layout 5**.
This layout puts the legend at the bottom and adds a data table, which contains all the data used to create the chart. It also removes the axis title at the bottom of the chart.
If you'd like to try out any of the other layouts, take a minute to do that.
5. In preparation for the next exercise, select **Layout 9** again.

Note that although the chart title remains, the chart axis titles are placeholders again. That's because some of the layouts you just tried did not include chart axes.

EXERCISE 6: CHANGE THE CHART TYPE

In this exercise you'll see what it's like to change the chart type after you've created a chart.

1. Click in the chart.
2. Click the **Design** tab if it is not already selected. In the **Type** group, click **Change Chart Type**.
3. Under **Column**, click **Stacked Column**. As you rest the point over each type, a ScreenTip will tell you what it is. Click **OK**.
4. Now change the chart type again. In the **Type** group, click **Change Chart Type**.
5. Click **100% Stacked Column**, the third type in the list.. After you select another column type, click **OK**.
6. Finally, create a line chart. In the **Type** group, click **Change Chart Type**. Under **Line**, select **Line with Markers**, and then click **OK**.
7. In preparation for the next exercise, select **Clustered Column** again, following steps 1 through 3.

EXERCISE 7: CHANGE THE LOOK OF THE CHART

The chart columns are in the standard colors that a column chart is automatically created in. In this exercise you will choose other colors for the chart.

1. IF necessary, click anywhere inside the chart to display the commands on the **Design** tab.
2. Click the **Design** tab. In the **Chart Styles** group, click the **More** button  so that you can see all the styles.
Choose any style that you like by clicking it.
The new colors and style are applied to the chart.

EXERCISE 8: FORMAT THE CHART TITLE

Now you'll give the chart title a little extra formatting.

1. Click in the chart title and select the text.
2. Click the **Format** tab. In the **WordArt Styles** group, click the arrow on **Text Fill** , and then rest the pointer over any of the colors. You'll see the title change. If you see a color you like, click it.
If the menu is over the chart title so that you can't see changes in the title as you rest the pointer over the

different colors, move the chart. Click the outer edge of the chart until the pointer changes to a four-headed arrow , and then drag the chart out of the way. You may have to grab the chart a few times to do this. If you select something you don't like, press CTRL+Z to undo your last action.

3. Now you can leave the title as is, and just check out the other options in the group, or you can make other selections for the title. In the **WordArt Styles** group, click the arrow on **Text Fill** again, and choose an option to work with. Note the **Gradient** option and the **Texture** option.
4. You could also click the arrow beside **Text Outline**  and **Text Effects** , and see the options there. If you find that you add more options than you like, you can always get back to the beginning by right-clicking in the title area and selecting **Reset to Match Style** or pressing CTRL+Z.

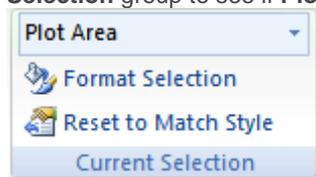
EXERCISE 9: FORMAT A COLUMN

In this exercise you'll add some formatting to the column.

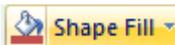
1. In the chart, click on the first column on the left, the first column for Hansen. You should see round selection handles at the corners of each of the three columns for Hansen. If you cannot get the selection handles to appear on all three Hansen columns, do this: On the **Format** tab, in the **Current Selection** group, click the arrow at the top of the group. A list will appear. Click **Series "Hansen"** in the list. That will select the columns for you.
2. On the **Format** tab, in the **Shape Styles** group click the arrow on **Shape Effects**, point to **Shadow**, and rest the pointer of the different shadow effects. A ScreenTip describes each effect. Click one that you like. If you don't like the results, you can get back to the original by right-clicking a column selecting **Reset to Match Style**.
3. If you want to apply the same shadow effect to the other columns, or try some other effect in the Shape Styles group, follow steps 1 and 2 for Alexander and Parker.

EXERCISE 10: FORMAT OTHER AREAS OF THE CHART

1. Click in the Plot Area (the area with gridlines). To be sure, on the **Format** tab, look in the **Current Selection** group to see if **Plot Area** is displayed at the top of the group.



Looking in the **Current Selection** group is how you can ensure that you have selected the correct area in a chart.

2. On the **Format** tab, in the **Shape Styles** group, click the arrow next to **Shape Fill** . Rest the pointer on any of the **Theme Colors**. You can see the Plot Area change color as you pass the pointer over the different colors. If you see a color that you think improves the look of the chart, click it.
3. Next in the **Shape Styles** group, click **Shape Effects** , and then point to **Shadow**. Under **Outer**, click the first shadow in the list (the ScreenTip says **Offset Diagonal Bottom Right**).

Whether you apply both a color and a shadow is up to you.

4. You can also add formatting to the chart area, which encompasses all the area outside the Plot Area. Click in the Chart area, see if it is selected by checking the **Current Selection** group, and give it a try if you would like to.

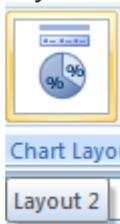
EXERCISE 11: MAKE A PIE CHART

Unlike a column chart, a pie chart can show only one set of values. The pie chart will show how the percentages for the charted values add up to a total.

1. Click the **Pie Chart** tab at the bottom of the spreadsheet.
2. Select cell A2 and drag to cell B6 to select the data in those five rows and two columns (do not select the total in cell B7).
3. On the **Insert** tab, in the **Charts** group, click **Pie**, and then click the first chart under **3-D Pie** (the ScreenTip says **Pie in 3-D**).



4. On the **Design** tab, in the **Chart Styles** group, click the **More** button  to see all the styles, and pick another style for the chart.
5. On the **Design** tab, in the **Chart Layouts** group, click the **More** button  to see all the layouts. Click **Layout 2**.



The chart is done. The percentages are shown for each part of the pie.

6. Finally, select the chart title placeholder text and type **Lunch Sales**.