



## Working with Charts

# Introduction to Charts



## Create Chart in PowerPoint

SIMPLE CHARTS



## Copy Chart From Excel

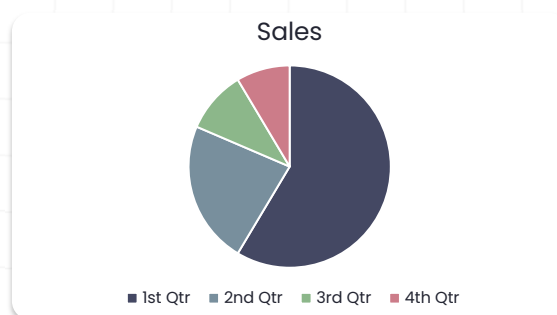
COMPLEX CHARTS

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## Create Chart in PowerPoint

SIMPLE CHARTS



The chart is simple and **doesn't cover much data or detail**

FINANCIALEDGE<sup>7</sup>



## Create Chart in PowerPoint

SIMPLE CHARTS



## Copy Chart From Excel

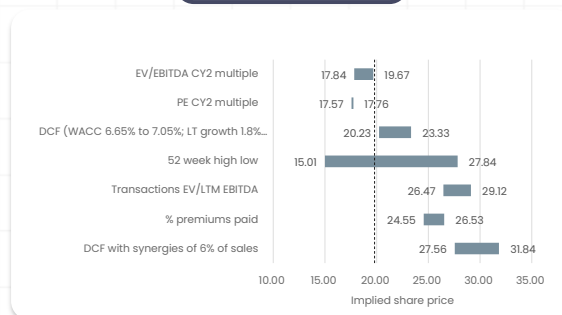
COMPLEX CHARTS

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## Copy Chart From Excel

COMPLEX CHARTS



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## Exercise File



Download the file '**Working with Charts – exercise file**'

## Exercise File



Create a **blank slide** in your **PowerPoint presentation**



## Exercise File



Open the Excel file – **‘Working with charts – exercise file’**

## Exercise File



Once **you’ve opened the Excel file**, you should see a chart for **‘Stock Price History’**



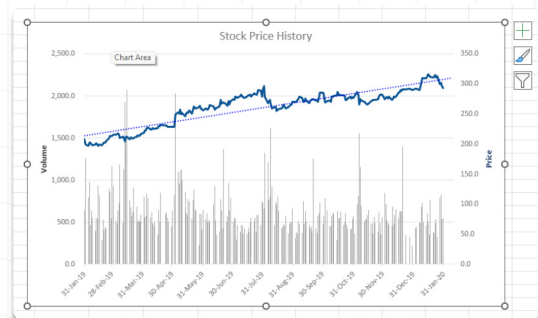
# Importing Excel Charts - Image

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## Importing as an image

**1**

**Select** the chart from  
Excel and press

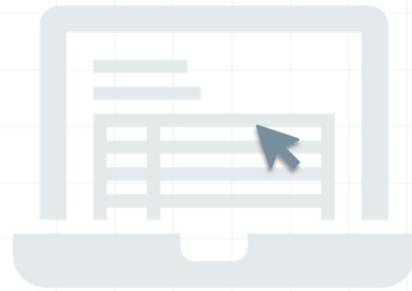
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## Importing as an image

2

Go into your **PowerPoint** presentation and **select the slide** you want to add it to

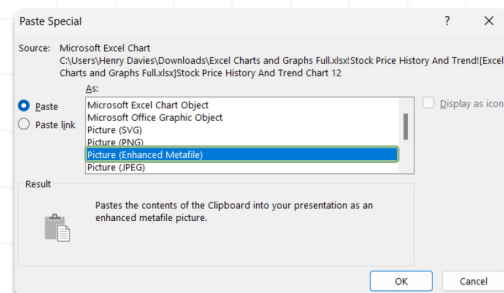
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## Importing as an image

3

ctrl + alt + V

A new panel will appear titled '**Paste Special**'



Select the option '**Picture (Enhanced Metafile)**'

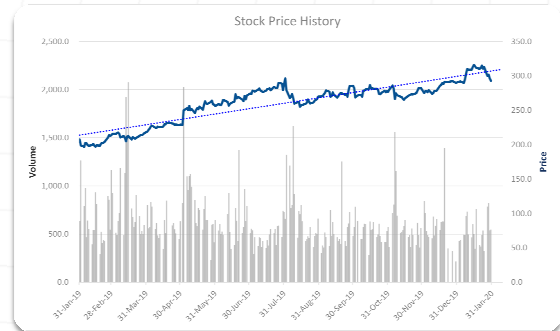
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## Importing as an image

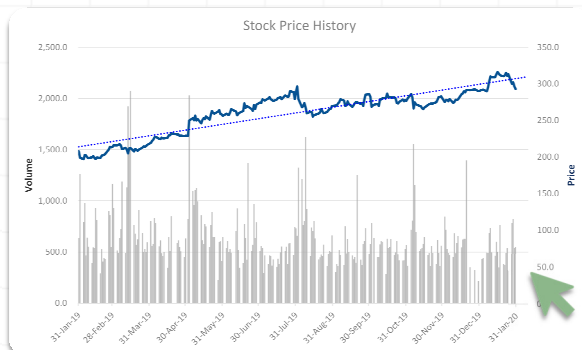
4

The **chart image** will then be **inserted** into your slide

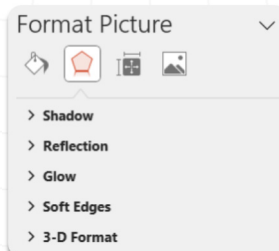


## Formatting

The **formatting** applied to the chart in Excel **will appear the same** in PowerPoint, including colors and fonts



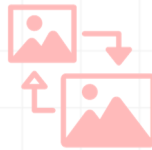
You can edit this image like any other





## DISADVANTAGE

Changes to the data in Excel **won't be carried over**



**Replace** image when the data changes

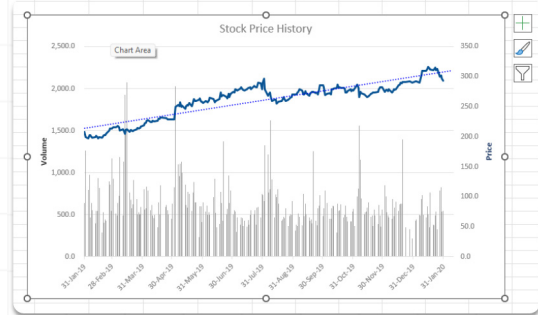
# Importing Excel Charts – Automatic Updates



## Chart with Automatic Updates

1

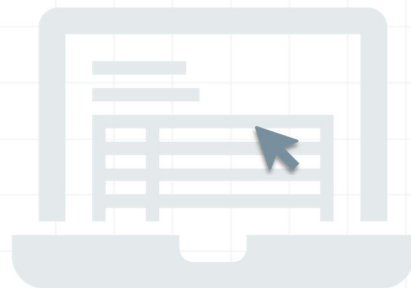
Select the chart from  
Excel and press

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## Chart with Automatic Updates

2

Go into your **PowerPoint**  
presentation and **select the**  
**slide** you want to add it to

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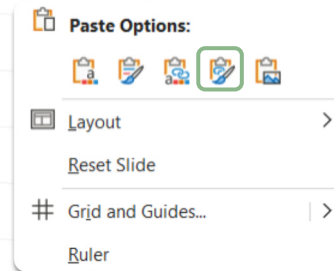


## Chart with Automatic Updates

3

**Right-click** on the slide

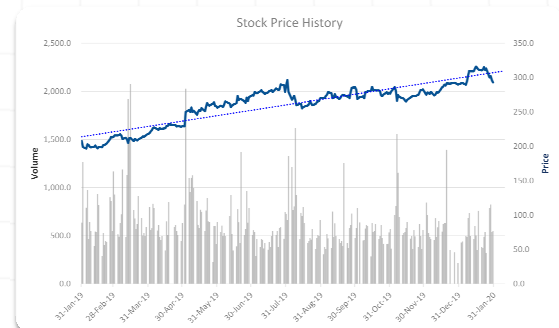
Select the fourth option  
**'Keep source formatting  
and link data'**

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## Chart with Automatic Updates

4

The **chart** will then be  
**inserted** into your slide

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## ADVANTAGE

Changes to the data will **automatically be carried over**



If the presentation is closed,  
go to **'Chart Design'** and  
select **'Refresh Data'**

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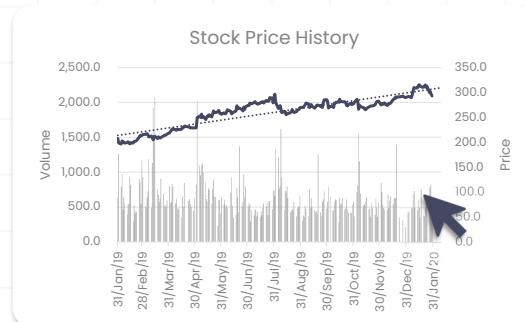
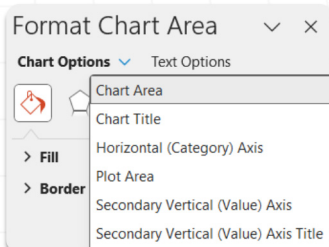
## Greater flexibility in formatting the chart:

Data points

Axis labels

Chart title

And more

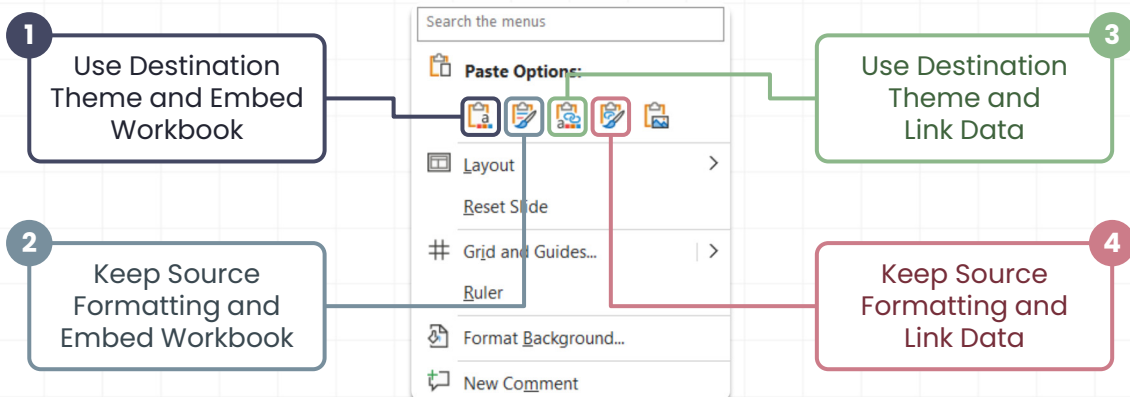
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# Importing Excel Charts – Paste Options

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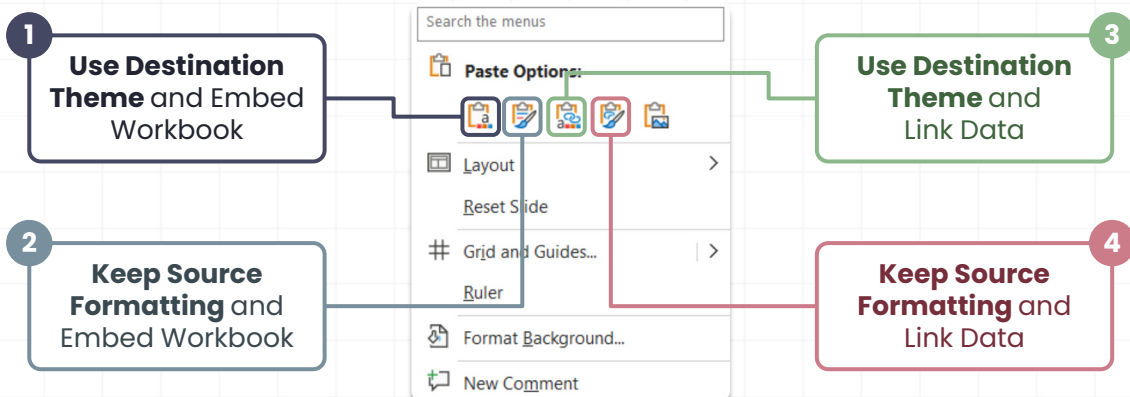
## Paste Options

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# Use Destination Theme vs Keep Source Formatting

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## Paste Options

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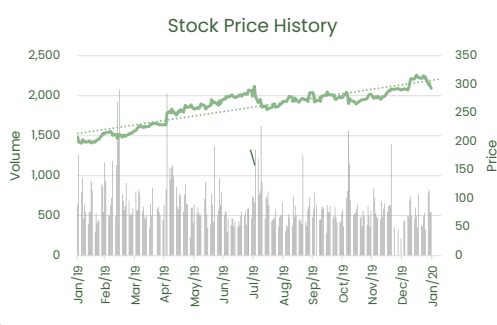
## Use Destination Theme



## Keep Source Formatting

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## Use Destination Theme

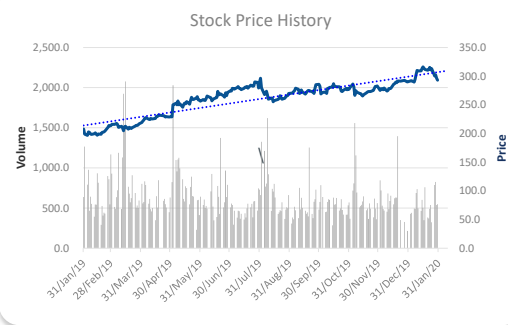


The chart will apply the **theme style** set in the presentation, including the theme colors and fonts

VS



## Keep Source Formatting



The **formatting** is carried over from the underlying **Excel spreadsheet**. Alternative fonts or colors will be integrated

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### Use Destination Theme

Best practice to ensure consistency in styling

vs

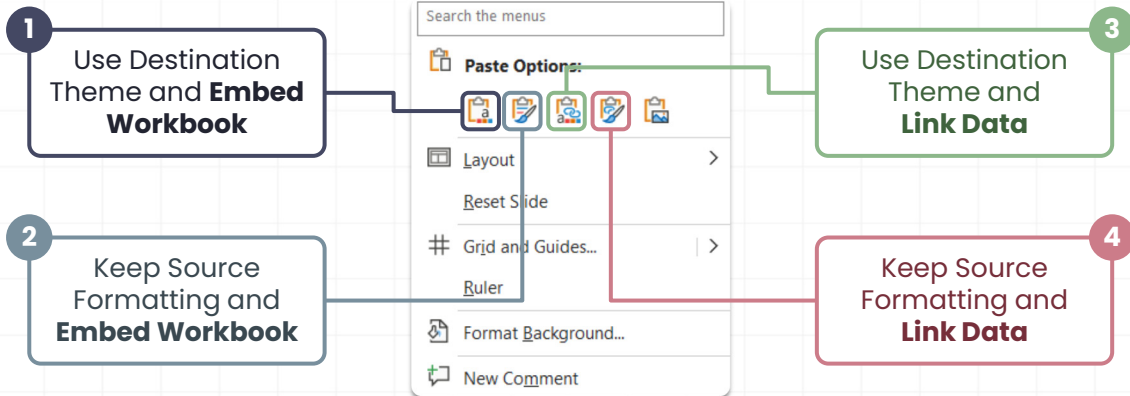


### Keep Source Formatting

Use this option if company fonts or colors make chart difficult to read

## Embed Workbook vs Link Data

## Paste Options

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### Embed Workbook

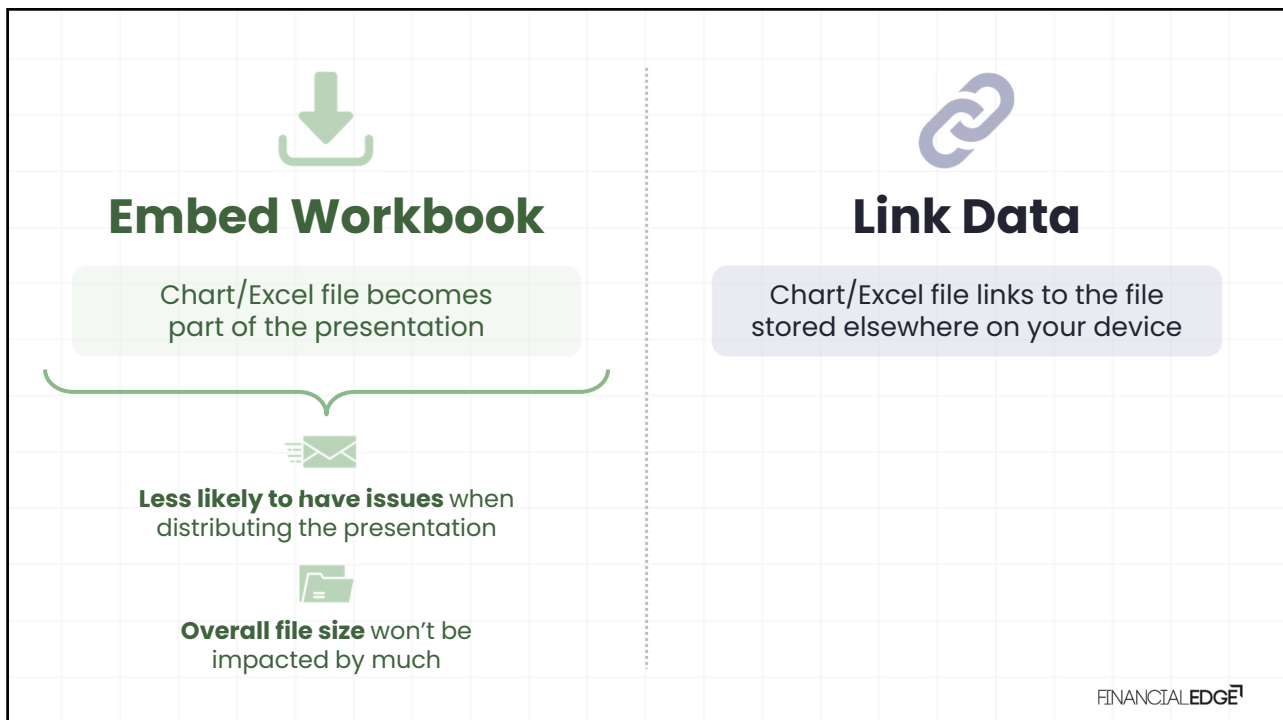
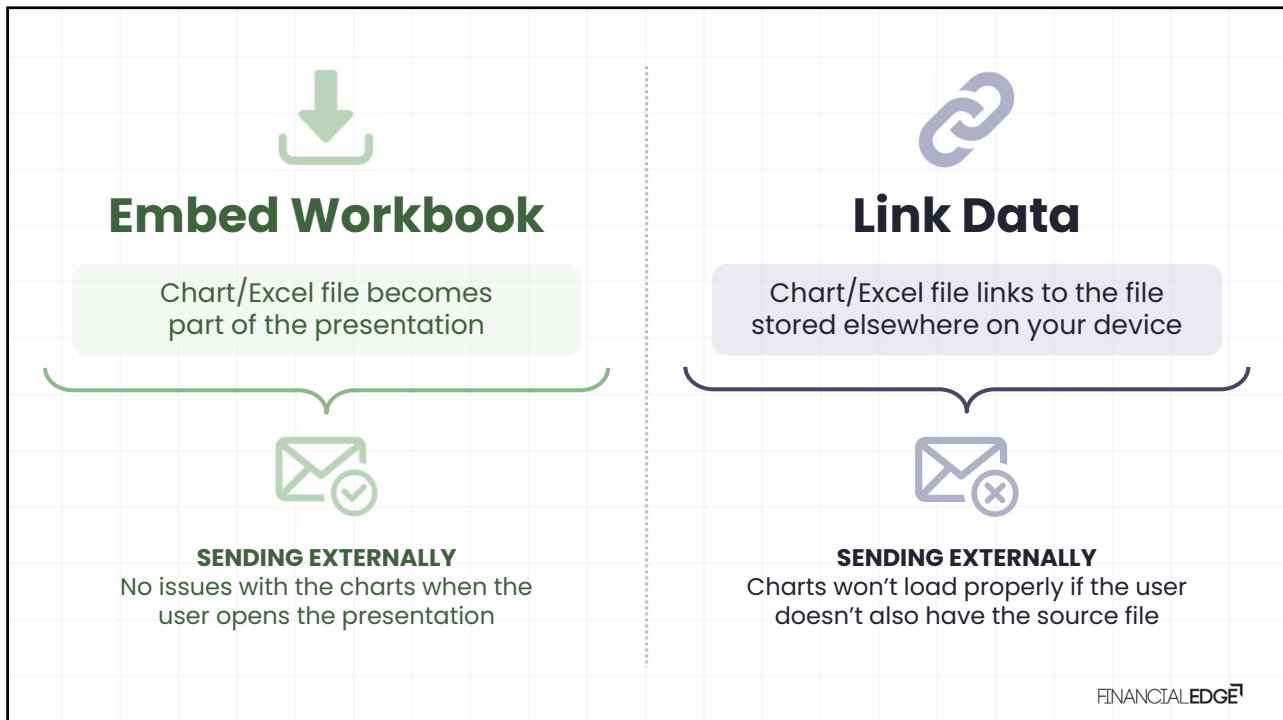
Chart/Excel file becomes part of the presentation

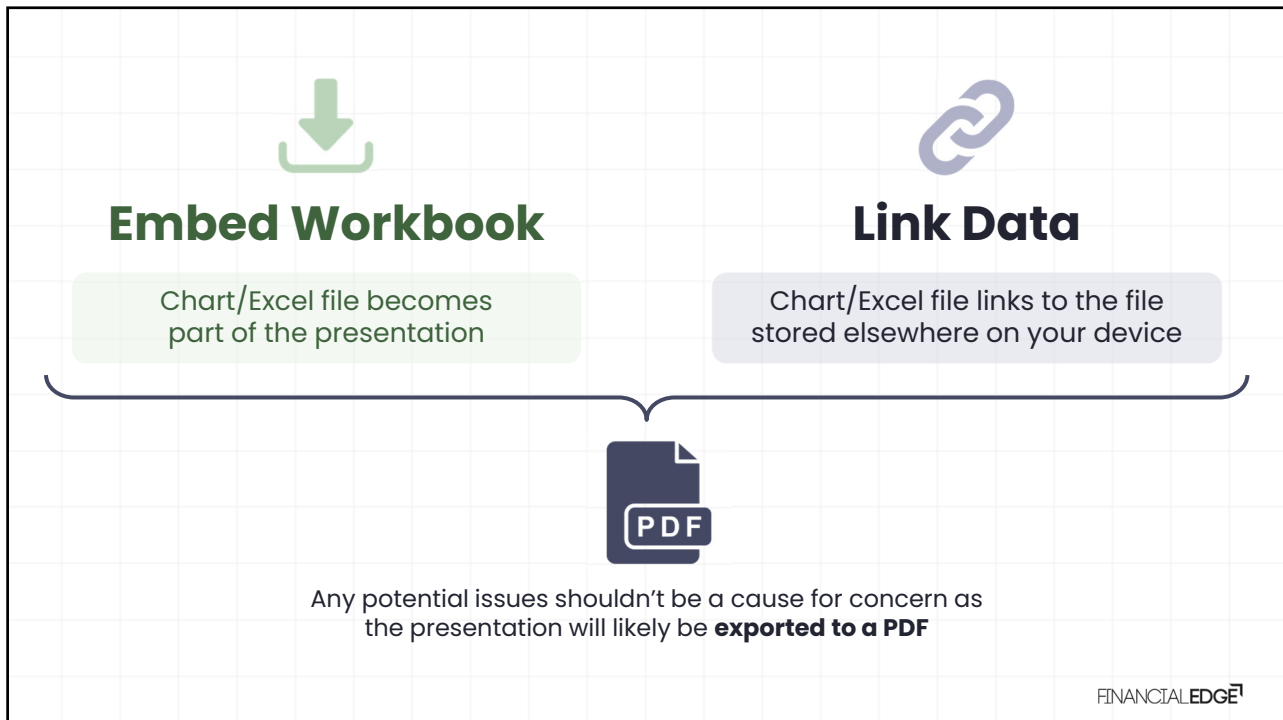


### Link Data

Chart/Excel file links to the file stored elsewhere on your device

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## Chart Design - Imported Charts from Excel

## Imported Charts

The entire chart can be formatted in various ways using PowerPoint tools



## Chart Layouts



- Axes >
- Axis Titles >
- Chart Title >
- Data Labels >
- Data Table >
- Error Bars >
- Gridlines >
- Legend >
- Lines >
- Trendline >
- Up/Down Bars >



**Add, remove, or change** the elements of your chart

Title

Legend

Axis

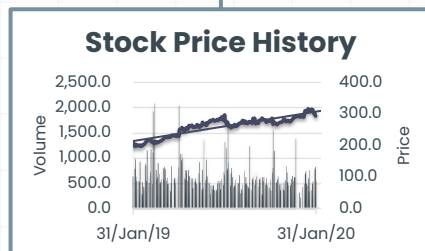
Gridlines

Data labels

Data table



## Chart Styles



Change the overall **look** and **feel** of your chart

Color scheme

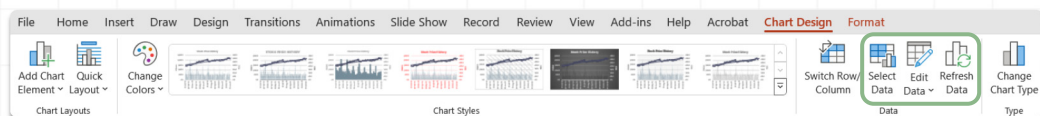
Fill type

Border

Shadow

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## Data Tool



**Edit** data

**Refresh** data if **changes** are **made** to Excel file

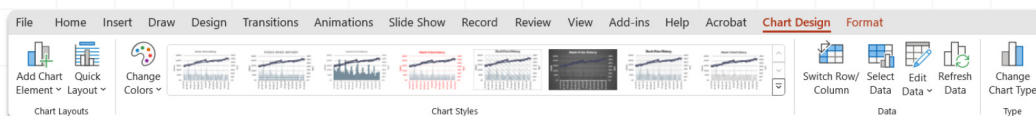
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## Change Chart Type



**Review alternative** chart types to help assess if the **chart carried over from excel** is best suited

## Format Chart Area



Useful when needing more **accuracy** in formatting the **various layers**

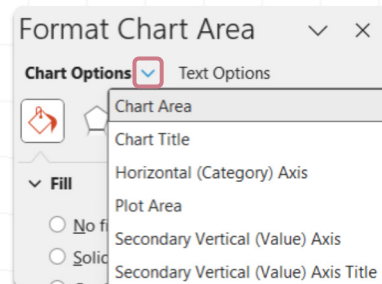


**Options available** will depend on the **layer** selected

Format fill and line properties

Size and proportion of components

Add effects





## Formatting Considerations



Have company **style guides** and **client in mind**



Make sure the **chart aligns** with **other charts produced**



**Don't add unnecessary details or effects** to overcomplicate the chart

## Creating a Simple Chart in Excel



## PowerPoint

Chart is **simple** and doesn't cover much data or detail



## Excel

Chart is more **complex** (import it from Excel)

### Improve creating charts in PowerPoint

**Copy** and **paste data from Excel** into PowerPoint to create a chart

You can **input the data manually** without transferring over from Excel

## Exercise File



To follow along,  
download the file  
**'Working with Charts –  
Exercise File'**



## Building a Bar Chart

1

**Highlight** the section of data in your spreadsheet, **press**



To **copy**

11-Mar-19	212.6	488.9
12-Mar-19	209.8	1,130.6
13-Mar-19	204.8	1,922.5
14-Mar-19	211.6	1,471.9
15-Mar-19	212.4	2,076.6

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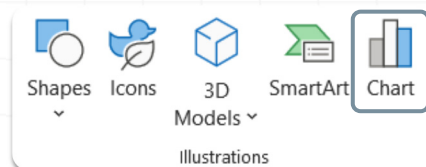
## Building a Bar Chart

2

Go into PowerPoint, **press**



To open the **'Insert'** tab



Then click on **'Chart'** in the ribbon

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## Building a Bar Chart

3

Select the **chart type** you'd like to use and **press 'OK'**

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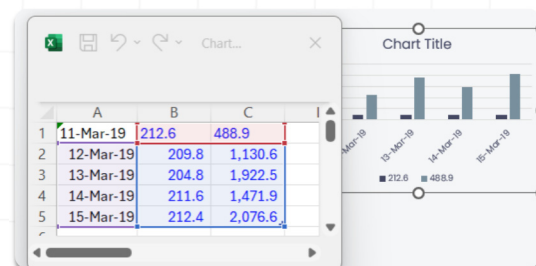
## Building a Bar Chart

4

The **chart** will appear on the slide along with an **Excel spreadsheet**. **Remove** the data and **press**



To **paste** in the data from Excel

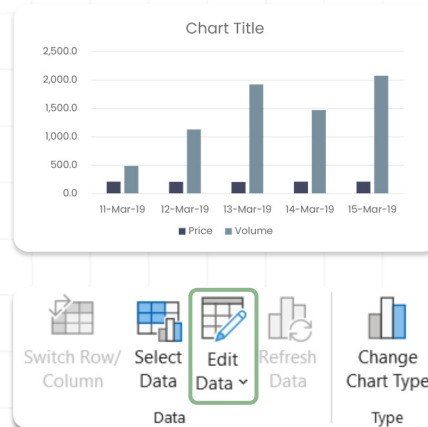
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## Building a Bar Chart

5

The chart will then  
**appear in the slide**

To edit the data further,  
go to '**Chart Design**' and  
select '**Edit Data**'

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## Formatting Tips for Charts

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1

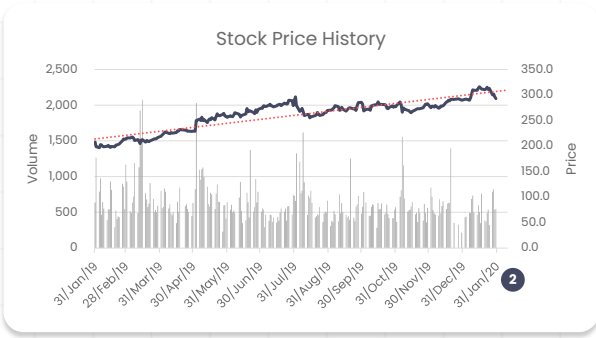
Removing decimal points

2

Formatting dates on the axis

3

Removing gridlines



Click on the **'Chart Options'** dropdown, and select the **'Horizontal (Category) Axis'**

Select the icon on the right (bar chart) which is titled **'Axis Options'**

In the **'Format Code'** box, **remove all the text**, replace with **mmm/yy**, and click **'Add'**

**Format Chart Area**

Chart Options | Text Options

Chart Area

Chart Title

Horizontal (Category) Axis

Plot Area

**Format Axis**

Axis Options | Text Options

Axis Options

Tick Marks

Labels

Number

Category

Custom

Type

mmm/yy

Format Code

mmm/yy

Add

Linked to source

1

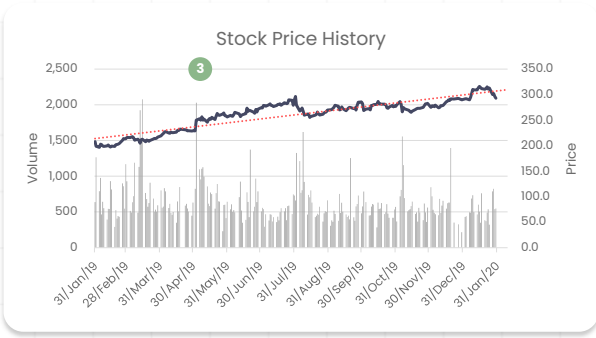
Removing decimal points

2

Formatting dates on the axis

3

Removing gridlines



Select the chart, and then **click on the gridlines**

**Blue circles** will appear on either end of the gridlines

In the dropdown category 'Line', **select 'No Line'** and the gridlines will be **removed**

**Format Major Gridli...**

Major Gridline Options

Line

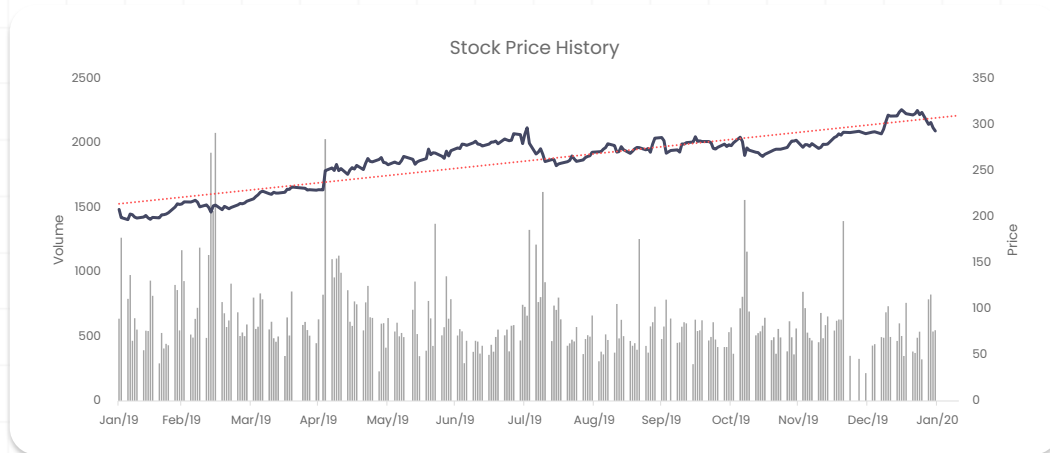
No line

Solid line

Gradient line

Automatic

## Reformatted Chart Example

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## Creating Templates for Charts

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## Templates

Features when selecting '**Charts**' button in the ribbon

Save **existing chart** from PowerPoint including:



Formatting



Decimal places



Dates



**Saves time** on building new charts



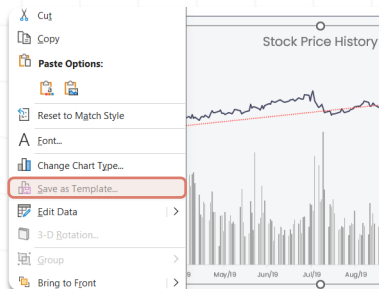
**Ensures consistency** between charts across a presentation

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## Templates

1

Select the chart and right-click.  
Then select '**Save as Template**'

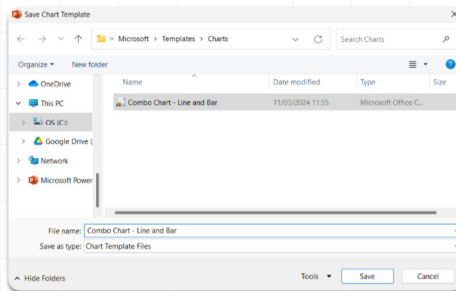


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## Templates

2

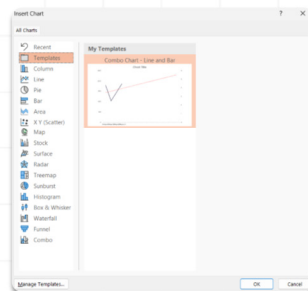
Save as something **distinctive** in case you use **multiple chart templates**

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## Templates

3

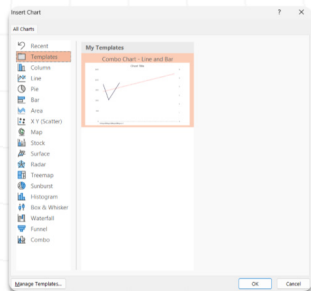
The chart template will then be added to the **'templates'** section

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## Templates

3

The chart template will then be added to the **'templates'** section



You can **copy charts** into the presentation

Apply this template to **speed up the process** and **ensure consistency**

This chart will also be **carried over into Excel** as a **saved option**

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