

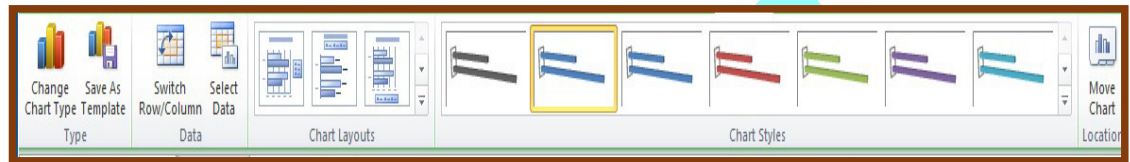
Course
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Chart Layout and Formatting in MS Excel

Microsoft Excel

Module 44 - Chart Layout and Formatting in MS Excel

The Chart Design menu in Excel (also called Chart Tools > Design) provides powerful helping tools for customizing the layout, style, and data of your chart. These tools appear only after you click on a chart, and they make it easy to improve both appearance and function.



Type Group

- **Change Chart Type** lets you switch your existing chart to a different style (e.g., bar, line, pie) to better visualize your data.
- **Save as Template** allows you to save a customized chart design (colors, layout, formatting) so you can reuse the same style for future charts quickly.

Data Group

- **Switch Row and Column** swaps the chart’s data orientation—turning row values into series and column values into categories, or vice versa.
- **Select Data** lets you modify the chart’s data source—add, remove, or rearrange data series and categories displayed in the chart.

Chart layout refers to the arrangement and placement of key chart elements—such as the title, legend, axis labels, gridlines, and data labels—to organize how information is visually presented in a chart.

Chart styles refer to pre-designed visual themes or formatting options that quickly change the look of your chart, including colors, background patterns, and font styles, to enhance its appearance and readability.

Move Chart allows you to relocate a chart to a different sheet within the workbook or place it on a new, separate chart sheet for better organization or presentation.

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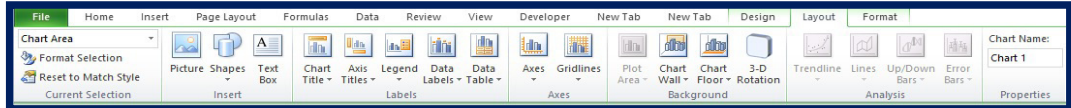
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Layout Menu

In a chart, layout refers to the arrangement and positioning of the chart's components (like stitles, axis labels, legends, data labels, and gridlines) to enhance clarity and readability. It determines how these elements are organized within the chart to present data effectively.



Format Selection in Excel allows you to customize the appearance of specific chart elements (like bars, axes, titles, or data labels) by adjusting properties such as colors, fonts, borders, and effects to suit your preferences.

Insert Group

Picture: In the context of charts and Excel, Picture refers to the option to insert an image or graphic into your chart or worksheet. You can use Picture to:

- Insert a picture as a background for your chart or within the chart itself.
- Use pictures for data points (for example, inserting logos or images instead of bars or dots).

Shape: In the context of design and software like Microsoft Excel, shapes refer to graphic elements that can be inserted into documents, presentations, or charts. Shapes are basic, often geometric, structures that help visualize data, enhance the layout, or communicate ideas in a more visually appealing way.

Text box: A text box is a container in which text can be entered, displayed, and formatted, often used for annotations, captions, or labeling in documents and designs.

Labels Group

- **Chart Title:** A chart title is a descriptive heading placed at the top of a chart, providing context or identifying the data being represented, helping viewers understand the purpose or content of the chart.
- **Axis Title:** An axis title is a label placed along the axes of a chart (typically the X and Y axes), indicating what each axis represents, such as the variable or unit of measurement, to provide clarity on the data being displayed.

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- **Legend:** A legend is a chart element that explains the meaning of different colors, patterns, or symbols used in the chart, helping viewers understand what each data series or category represents.
- **Data Label:** Data labels are text labels displayed on a chart that show the exact values or information for individual data points, making it easier for viewers to interpret specific values directly on the chart.
- **Data Table:** A data table in a chart is a grid of values displayed below or beside the chart, showing the raw data used to create the chart, allowing viewers to see the exact numbers behind the visual representation.

Axes Group

- **Axis:** Axes are the reference lines on a chart that define the scale and orientation for plotting data. Typically, a chart has two axes:
- **X-axis (horizontal):** Represents the independent variable, categories, or time.
- **Y-axis (vertical):** Represents the dependent variable, values, or measurements.

Gridlines: Gridlines are horizontal and vertical lines on a chart that help guide the viewer's eye, making it easier to interpret the data by aligning the data points with the axis scales. They improve readability and accuracy of the chart.

Background Group

Plot Area: The region of a chart where the data is visually represented, typically enclosed by the axes and gridlines.

Chart Wall: The background surface of a 3D chart, providing depth and context for the chart's data.

Floor: The bottom surface of a 3D chart that gives a base to the chart, often in 3D visualizations.

3D Rotation: The ability to rotate a 3D chart along its axes to view the data from different angles for better visualization.

Analysis Group

- **Trendlines:** Lines added to a chart to show the general direction (upward or downward) of data over time.
- **Up/Down Bars:** Visual indicators in a chart that highlight the range or changes in data, often used in stock or financial charts.
- **Lines:** Straight or curved marks used to connect data points or represent relationships in a chart.

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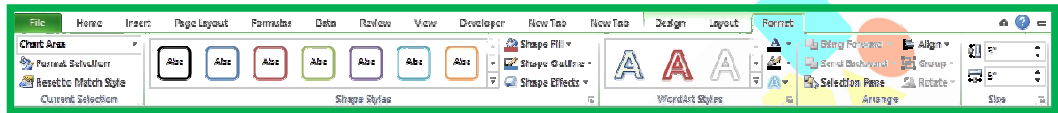
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- **Errors:** Error bars are used to show the variability or uncertainty of data points, indicating possible error margins in measurements.

Format Menu

Format Selection in Excel allows you to customize the appearance of specific chart elements (like bars, axes, titles, or data labels) by adjusting properties such as colors, fonts, borders, and effects to suit your preferences. It provides detailed control over individual elements of a chart.



Shape Styles Group

- **Shape Fill** allows you to change the color, gradient, texture, or pattern inside a shape or chart element.
- **Shape Outline** allows you to change the color, thickness, and style of the border around a shape or chart element.
- **Shape Effect** adds visual effects like shadows, reflections, glows, or 3D styles to a shape or chart element to enhance its appearance.

WordArt Styles are pre-designed text formatting options in Excel and other Microsoft Office applications that apply artistic effects to text, such as shadows, outlines, gradients, and 3D effects, making the text visually appealing.

- **Text Fill** changes the color or pattern inside the text, allowing you to apply solid colors, gradients, or textures to the letters themselves.
- **Text Outline** allows you to change the color, thickness, and style of the border around the text, enhancing its visibility or creating a specific effect.
- **Text Effect** adds visual enhancements to text, such as shadows, reflections, glows, 3D effects, or transformations, to make the text stand out or appear more dynamic.

Arrange Group

- **Bring Forward** moves a selected object or chart element closer to the front, layering it above other objects or elements in the worksheet or chart.
- **Send Backward** moves a selected object or chart element further behind other objects or elements in the worksheet or chart, layering it beneath them.

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- **Selection Pane** in Excel allows you to view, select, and manage all the objects (like charts, shapes, or text boxes) in a worksheet, making it easier to hide, rename, or reorder them.
- **Align** in Excel allows you to position multiple objects (such as shapes, charts, or text boxes) relative to each other or to the page, ensuring they are evenly spaced or aligned in a specific direction (top, bottom, left, right, or center).
- **Rotate** allows you to turn an object, such as a shape or chart element, around a central point, either by a specific angle or freely, to adjust its orientation.
- **Height and Width** refer to the dimensions of an object (like a shape, chart, or image) in Excel, where you can manually adjust the vertical (height) and horizontal (width) size to fit your layout needs.

