

Chapter 4: Chart Formatting

Chart Formatting

The number of options to format a chart is nearly limitless, and to add to the confusion, there are different ways to get to these options. For example, you've already completed exercises where you've used the context-specific chart tabs in the Ribbon, the Chart Elements icon next to the chart, as well as the font options on the Home tab.

As I mentioned earlier, you'll find the more complex or obscure options in the Ribbon. In fact, all chart options will be in the Ribbon somewhere. I tend to go to the three icons to the right of my chart first. If the option I need isn't there, then I go to the Ribbon.

Current Selection

On the Format tab, the top option in the Current Selection area is Chart Elements. Click the drop-down arrow to see all the different chart elements available for your chart type. Choose an item, such as Chart Title. Notice the title in your chart is now selected and has a border around it. By choosing the appropriate option in the Chart Elements list, you can quickly select the corresponding item in the chart itself.

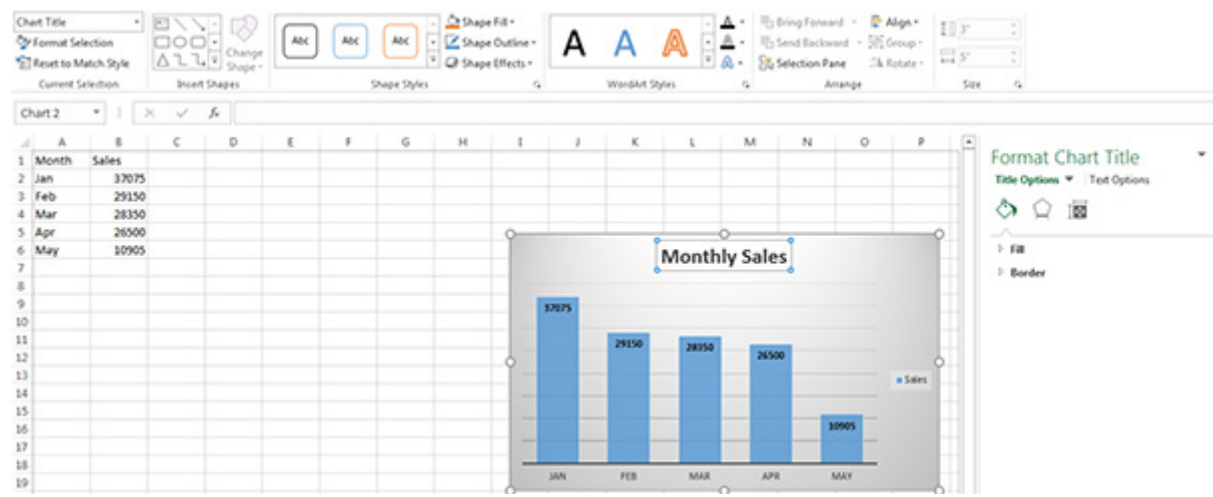
The reverse also works. If you click an element on the chart, it will change the option in the Chart Elements list to match. To see how this works, use your cursor to select your chart legend. When you click the legend, you'll see the Chart Elements list changes to match the item you selected.

I point this out because the Chart Elements list can help you identify any component of your chart. It can also provide you with a visual cue in case you click a piece of your chart and wonder if you've selected the right item. When you click the item on the chart, simply look up into the Chart Elements list and see what's displayed.

Format Selection

The next item in the Current Selection area is Format Selection. This is a very powerful option if you want to specifically format a piece of your chart differently from the others. You'll use it in combination with the Chart Elements list.

From the Chart Elements list, select **Chart Title**. Then click **Format Selection**. A Format dialog box appears containing special formatting options specific to the element you chose. In the example below, you'll see the dialog box labeled Format Chart Title.



Format Chart Title dialog box

Go ahead and select each of the items in the list to see what's available in your specific Format dialog box. Since there are just way too many charting options to cover in one lesson, make sure to spend some time experimenting with these to find something you like. To close this dialog box, click the **X** icon located in the upper right.

Reset to Match Style

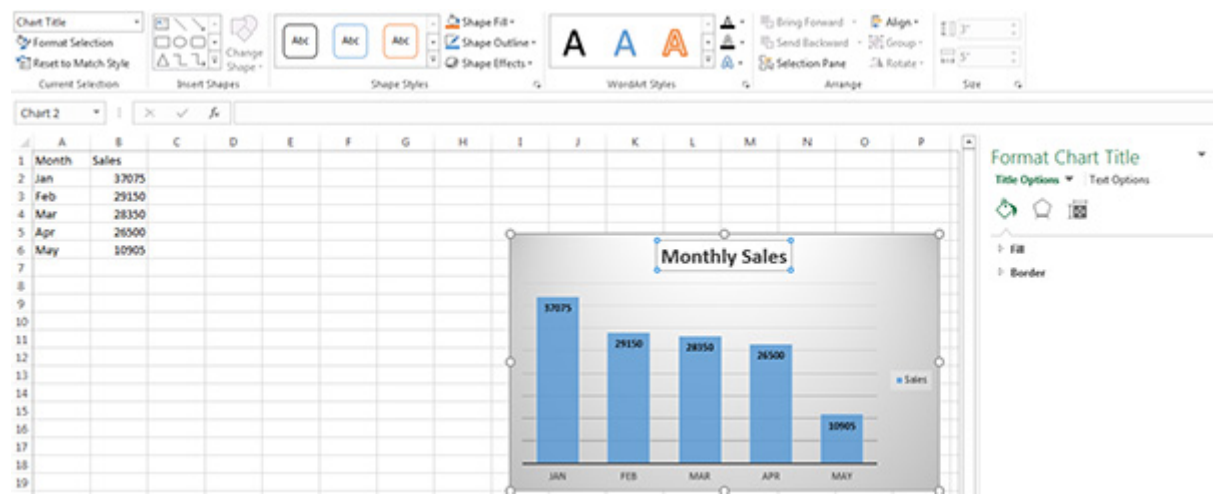
The final item in the Current Selection area is Reset to Match Style. We won't spend a whole lot of time on this one, but I'll point out what it does. This feature is your saving grace if you've customized a chart element and want to undo and go back to match the rest of the chart. You'd select the chart element in question and then click **Reset to Match Style**. The chart element goes back to a state that matches the chart style you're using.

Shape Styles

Now let me show you another fantastic feature of Excel.

From the Format tab of the Chart Tools Ribbon, there's a section called Shape Styles. You can apply a different and unique style to each of the shapes in your chart. Start by making sure you have the **Chart Area** option selected in the Chart Elements list in the Current Selection area. Or you can click the very outside border of your chart to achieve the same result.

With the entire chart selected, click the down arrow with the line above it in the Shape Styles area to reveal all the different styles available for this chart type. Here's where it gets cool. Move your cursor over all the available options. Did you see how Excel provides a preview of how your chart will look if you chose that option?



Shape Styles

Go ahead and choose different options in the Chart Elements list, like Legend or Plot Area. Now when you move your cursor over the available style options, just that element will receive the formatting change. Wow, how's that for flexibility?

WordArt Styles

WordArt Styles allow you to create even fancier customizations to the words and numbers in your chart. Just like the previous Shape Styles, you can apply WordArt Styles consistently within the whole chart or to specific chart elements.

From the Format tab of the Chart Tools Ribbon, you'll see a section labeled *WordArt Styles*. Select the **Chart Title** element of your chart, and then open the various styles by clicking the down arrow next to each. If you move your cursor over each option, your chart title will change interactively to reflect what the style will look like. It behaves exactly like the Shape Styles feature.

Go ahead and spend a few moments scrolling through all the WordArt Styles available. Make sure to choose different elements of your chart to see options specific to that element. There are a lot of great style options available that will surely add visual interest to your chart. Not all options listed will be available. These are easily identifiable because they'll be grayed out. I can only assume they're grayed out because those WordArt styles aren't compatible with chart elements. I don't know for sure, but I've found the ones that are available are quite useful.

Chart Size

The final item you'll learn about is how to resize your chart. Sounds simple enough, but since there are always multiple ways to accomplish the same task in Excel, I thought you should know about three of them; then you can decide which way works best for you.

First, if you select the **Chart Area** element, Excel places a border around your entire chart. If you examine the border, you'll notice squares at the corners and all four sides. These squares help you manually drag a chart wall to make it bigger or smaller. When you place your cursor over a set of the squares, your cursor will change into a two-sided arrow. Then, click and hold your mouse, and move in one of the arrow directions.

If you happened to choose the squares in one of the corners, Excel will allow you to adjust both adjacent sides of that corner. Again, place your cursor over the corner squares until you get the two-sided arrow. Click, hold, and drag your mouse in the direction of the arrows. You'll see that both sides will adjust automatically.

Now locate the **Size** section within the Format tab of the Chart Tools Ribbon, and then click either **Height** or **Width**. They're located in the last section on this tab. The one on top controls height, and the one on bottom is width.

If you know the height and width that you want for your chart, you can simply click the existing number and type a new number. To activate this change, press ENTER, select a different icon, or click anywhere on your worksheet.

Or you can click the up or down arrows located to the right of **Height** or **Width**. Each click of the arrow you select will adjust the chart size by 0.1 inches. If the size of your chart needs to adjust dramatically, the first two options will be much faster. But if you want to be very precise with your increments, try this method.

You've done a lot for one lesson. Go ahead and close Excel. Excel will ask you if you want to save the worksheet containing the chart you created today. If you'd like, you can save it for further practice, but you won't need it again for this course.