
Lesson 14 Formatting a Chart

Lesson Topics

- Selecting Items
- Formatting Items

Lesson Objectives

At the end of the lesson, you will be able to:

- Select any of the items that make up a chart;
- Display the appropriate Format dialog box for each chart item;
- Format the text for the titles and the legend.

Student Files Used

You will use the following file from your student folder:

- Sales Chart 5

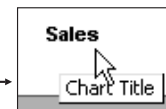
Identifying and Selecting Chart Items

Once a chart is created, Excel lets you make changes to almost every item on the chart. In order to make changes, you have to identify and select the item to be modified. When you point to an item, Excel displays a ToolTip with the item's name so you can be sure you are pointing correctly. To select an item, you click it. Handles surround it and its name appears in the *Name Box* to the left of the Formula bar.

You are going to identify and select all the items of an Excel chart.

1. **Open Sales Chart 5.**
2. **Click the Chart1 sheet tab.**
3. **Point to the chart title, Sales.**

Notice the ToolTip with the name of the item.



4. **Click the chart title.**

Notice the handles and the shaded border, indicating that the item is selected.



You saw this in the last lesson. Also notice the name of the item, *Chart Title*, in the *Name Box* at the left of the Formula bar and in the *Chart Objects* button on the Chart toolbar.

5. **Point to the Y-axis title, Dollars.**

Notice the ToolTip with the name of the item, *Value Axis Title*.

6. **Click the Value Axis title.**

Notice the handles and the shaded border (which you have seen before) and *Value Axis Title* in the *Name Box*.

7. **Point to the X-axis title, Quarters. (Scroll down if you cannot see it.)**

Notice the ToolTip.

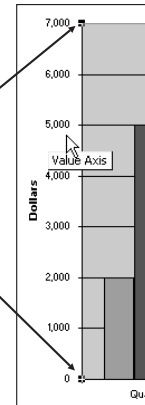
8. **Click the item.**

Again, notice the handles and the shaded border and *Category Axis Title* in the *Name Box*. (It may be too long to be completely displayed.)

9. **Point to one of the numbers (such as 5,000) on the Y-axis and notice the ToolTip.**

10. **Click the item.**

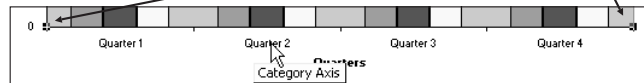
Notice the handles at the ends of the Y-axis line and notice *Value Axis* in the *Name Box*.



11. **Point to one of the quarters (such as Quarter2) on the X-axis and notice the ToolTip.**

12. **Click the item.**

Notice the handles at both ends of the X-axis line and notice *Category Axis* in the *Name Box*.

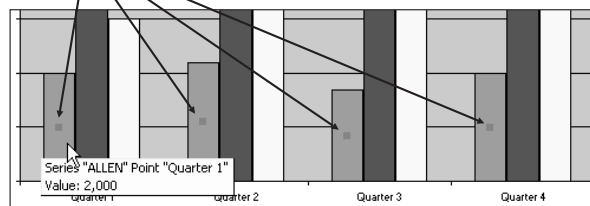


13. **Point inside the first ALLEN data point (i.e., the column) in the Quarter1 category.**

Notice the ToolTip.

14. **Click the ALLEN data point.**

Notice that all four data points of the ALLEN series have a handle. Notice *Series "ALLEN"* in the *Name Box*.



15. **Point inside the first data point of the BURTON series and notice the ToolTip.**

16. **Click the item.**

Notice the handles and *Series "BURTON"* in the *Name Box*.

17. **Point inside the first data point of the CARLSON series and notice the ToolTip.**

18. **Click the item.**

Notice the handles and *Series "CARLSON"* in the *Name Box*.

19. Point anywhere on the Legend box and notice the ToolTip.

20. Click the item.

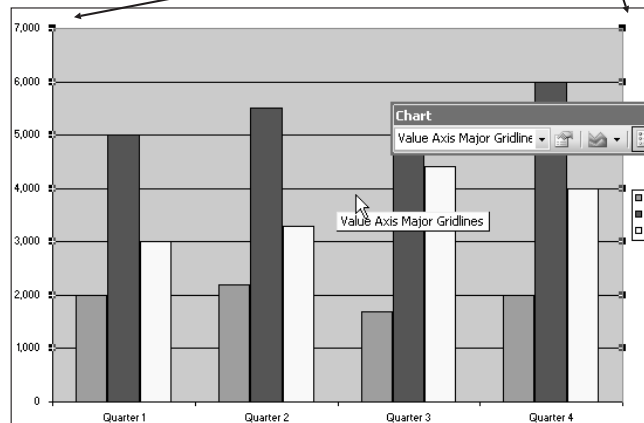
Notice the handles on the Legend box and *Legend* in the *Name Box*.

21. Point to any gridline.

Notice the ToolTip describing the type of gridlines selected.

22. Click the item.

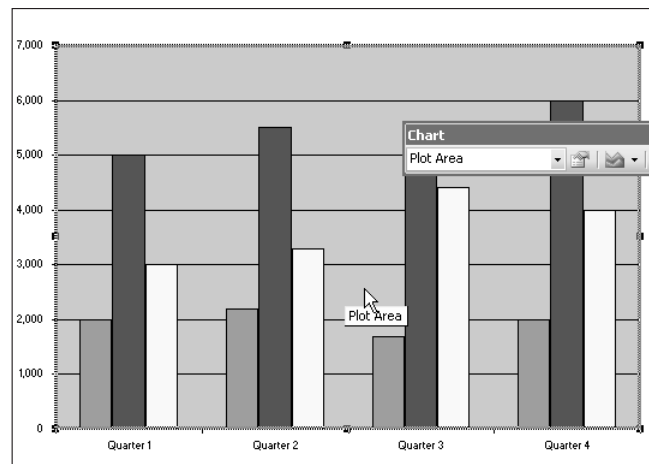
Notice the handles at both ends of all the gridlines. In the *Name Box* is *Value Axis Major Gridlines*.



23. Point to a blank area of the chart between two data points and notice the ToolTip with *Plot Area* on it.

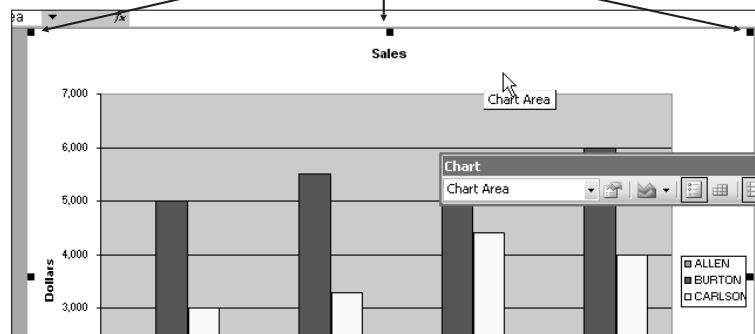
24. Click in the area.

Notice the handles and the shaded border surrounding the area of the data points. This is the *Plot Area*. Notice *Plot Area* in the *Name Box*.

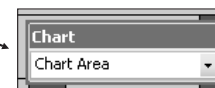


25. **Point to a blank area of the chart outside the plot area and notice the ToolTip with *Chart Area* on it.**
26. **Click in the area.**

The entire chart is selected. Notice the handles surrounding the chart and *Chart Area* in the *Name Box*.



The Chart Objects button (the first button) on the Chart toolbar also lets you select elements on the chart. Notice at the moment that the Chart Objects button is set to *Chart Area* because that is the object that is selected.



1. **Click the Chart Object button's down arrow.**

Notice the objects that you can select. →

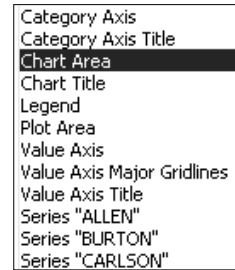
2. Choose *Plot Area*.

Notice that the Plot Area is once again selected.

3. Click the **Chart Objects button again and select *Category Axis*.**

Notice that the category axis is selected.

4. Select a few other objects on the **Chart Objects button.**

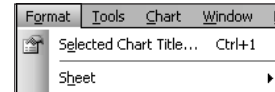


Formatting Items

Once an item has been selected, it can be formatted in a number of different ways. Each item on a chart has its own Format dialog box. You are going to access the Format dialog box for each item and notice which tabs are available.

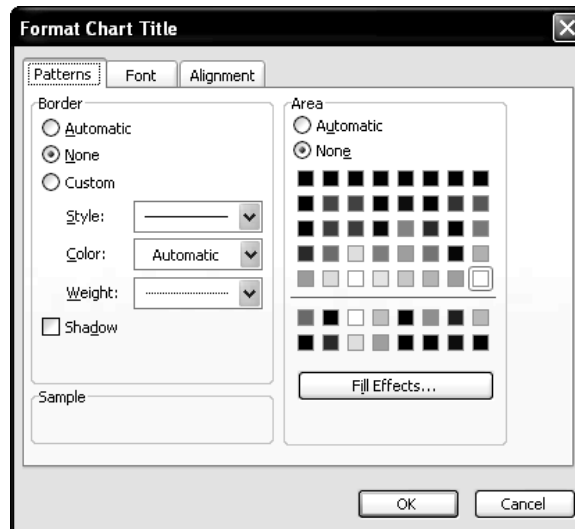
1. ***Sales Chart 5* should be open and the *Chart1* sheet should be active.**
2. **Select the chart title, *Sales*.**
3. **Click the **Format** menu.**

Notice that the Format menu has been altered → because the active sheet consists of the chart. Only items pertaining to charts are listed.



4. Choose *Selected Chart Title*.

The Format Chart Title dialog box appears. Notice the three tabs that are available — Patterns, Font, and Alignment. You are already familiar with the options on these tabs. The options on the Patterns tab affect the title box itself, the options on the Font tab affect the text that makes up the title, and the options on the Alignment tab affect how the text is placed within the title box.



5. You will not format the title at this time.

Click Cancel.

6. **Select the Y-axis title, *Dollars*.**

7. **Click the Format menu.**

Notice that the first command has changed to *Selected Axis Title*.

8. **Choose *Selected Axis Title*.**

Again, notice the same three tabs that are available — Patterns, Font, and Alignment.

9. **Click Cancel.**

10. You can also use the Shortcut menus to access the appropriate format dialog box.

Point to the X-axis title, *Quarters*, and right-click.

11. **On the Shortcut menu, choose *Format Axis Title*.**

Again, notice the same three tabs that are available.

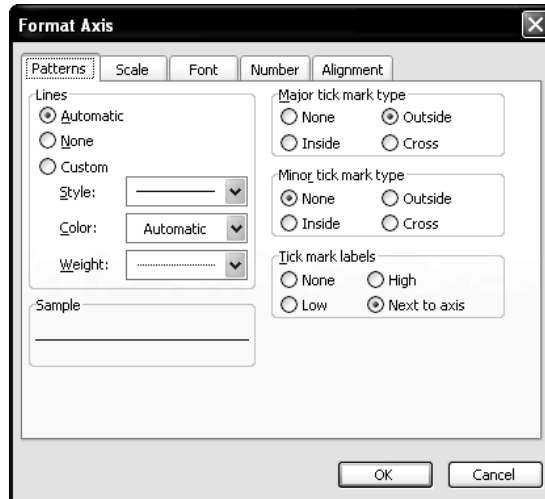
12. **Click Cancel.**

13. **Select the Y-axis by clicking on one of the numbers, such as *5,000*.**

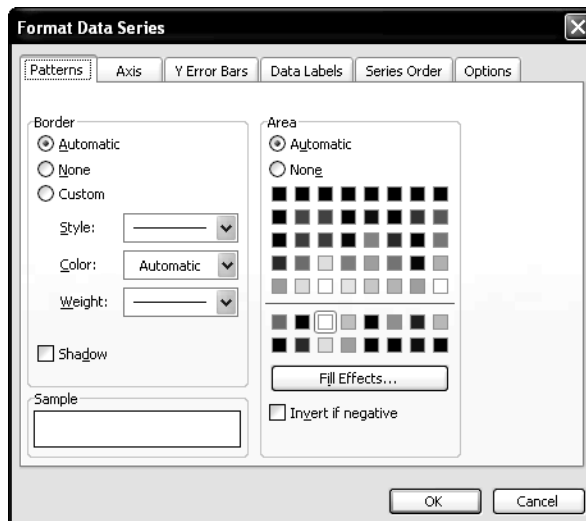
14. **On the Format menu, choose *Selected Axis*.**

The Format Axis dialog box appears. Notice that you have other tabs available — Patterns, Scale,

Font, Number, and Alignment. This is because you selected an item that contains more than just text.



15. **Click Cancel.**
16. **Point to any part of the X-axis or its labels and right-click.**
17. **On the Shortcut menu, choose *Format Axis*.**
Notice the same Format Axis dialog box.
18. **Click Cancel.**
19. **Select a data series.**
20. **On the Format menu, choose *Selected Data Series*.**



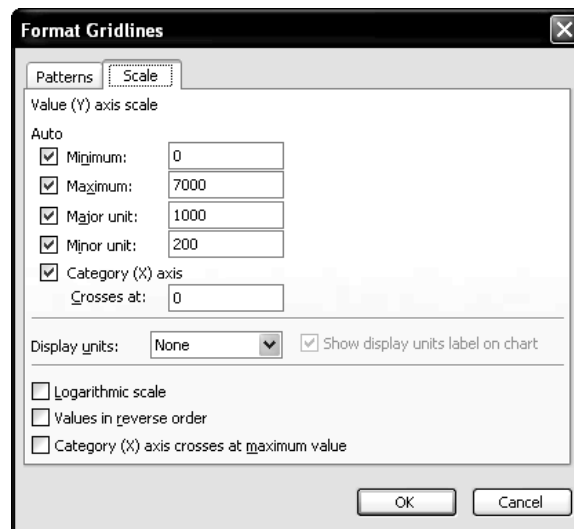
The Format Data Series dialog box appears. Notice the tabs for Patterns, Axis, Y Error Bars, Data Labels, Series Order, and Options. Only the Patterns tab has appeared in the other dialog boxes.

21. **Click Cancel.**
22. **Select the Legend box.**
23. **On the Format menu, choose *Selected Legend*.**

The Format Legend dialog box appears. Notice that Patterns, Font, and a new tab, Placement, are available.

24. **Click Cancel.**
25. **Select a gridline.**
26. **On the Format menu, choose *Selected Gridlines*.**
27. **Click the Scale tab.**

The Format Gridlines dialog box appears.



Notice the Patterns and Scale tabs. The Scale tab allows you to adjust the way the numbers of the Y-axis are displayed.

28. **Click Cancel.**
29. **Select the plot area. (To be sure that you have selected it, verify that its name is displayed in the ToolTip or in the Name Box.)**

30. On the Format menu, choose *Selected Plot Area*.

The Format Plot Area dialog box appears. Notice that only Patterns is available.

31. Click Cancel.**32. Select the chart area. Once again, the easiest way is to click below Legend box.****33. On the Format menu, choose *Selected Chart Area*.**

The Format Chart Area dialog box appears. Notice that only Patterns and Font are available. The Font applies to all fonts on the chart, unless you have specified other ones for specific items such as the axis titles.

34. Click Cancel.

Double-clicking an item lets you bypass the Format menu.

1. Double-click the chart title, *Sales*.

Notice the Format Chart Title dialog box.

2. Click Cancel.**3. Double-click a number on the Y-axis.**

Notice the Format Axis dialog box.

4. Click Cancel.**5. You can also select an object and click the Format button on the Chart toolbar.****Select a gridline.****6. On the Chart toolbar, point to the Format button.** 

Notice the ToolTip with *Format Gridlines*.

7. Click the Format button.

Notice the Format Gridline dialog box.

8. Click Cancel.

In summary, there are four ways to access a Format dialog box:

- Select an object and click the Format menu;
- Double-click an object;

- Right-click an object;
- Select an object and click the Format button on the Chart toolbar.

Changing Text

You can change any text that you have added to a chart. You are going to add a second line to *Sales*, put a box around it, and change the size of its font.

1. Select the chart title, *Sales*.

Remember that the shaded border indicates that an I-beam will appear when you position the pointer over the text. Also, you cannot resize a title box by dragging its handles. If it needs to be resized (for example, after inserting text), Excel will do so automatically.

2. Click an insertion point after *Sales* and then tap the ENTER key.

The box disappears and the insertion point goes to a second line.

3. Type: Year Summary

Notice the two-line title. By default, Excel uses center alignment for the text.

4. You are going to put a border around the title. To do this, you have to select the title box, which is not visible at the moment – only the text is visible. You cannot select the box while there is an insertion point in it.

Click somewhere outside of the title box.

5. Point to the chart title and click.

6. On the Format menu, choose *Selected Chart Title*.

The Format Chart Title dialog box appears.

7. If necessary, click the Patterns tab.

On the Patterns tab, notice that the *Sample* box is empty. This is because *None* is chosen in the *Border* group.

8. In the *Border* group, choose *Automatic*.

Notice the rectangle in the *Sample* box. It has the three characteristics chosen in the *Border* group — the style of the line is a single line, the color of the

line is black (*Automatic* applies the default color, which is usually black), and the weight is light.

9. Click the *Shadow* option, so that there will be a drop-shadow around the box.

In the *Sample* box, notice the shadow at the right and bottom border of the box.

10. The contents of the *Area* box allow you to choose a color and pattern for the title box itself.

In the Color palette of the *Area* box, choose one of the red colors.

11. You are going to change the font color to white.

Click the Font tab to display the tab.

12. Click the *Color* drop-down list box.

Notice the different text colors. Even if you do not have a color printer, you can use these font colors to create interesting effects.

13. Choose the white color.

Notice that the sample text in the *Preview* box is no longer visible. This is because both the box and the text are white.

14. Before closing, you are going to increase the font size.

In the *Size* list box, choose 16.

15. Click OK to close the dialog box.

16. Click somewhere off the title box to de-select it.

Notice the effect that you have created. Also notice that the title box stretched to accommodate the larger font size.



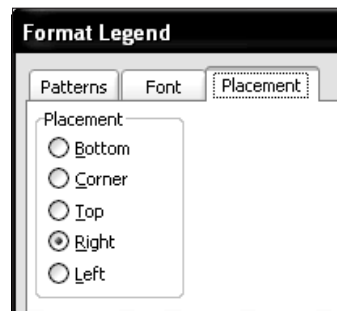
Formatting the Legend

You are going to place a line of dashes around the Legend and italicize the text.

- 1. Click the Legend box to select it.**
- 2. On the Format menu, choose *Selected Legend*.**
- 3. On the Format Legend dialog box, click the Patterns tab.**

4. In the *Border* group, click the *Style* drop-down list box.
5. Choose the third item, which is a line of dashes.
6. Click the *Weight* drop-down list box and choose the third line, which is a little thicker than the one above it.
7. Click the **Font** tab and choose *Italic* in the *Font Style* list box.
8. Click the **Placement** tab.

You are not going to make a selection on the Placement tab, but notice that the box offers a method of positioning the Legend box on the chart. Previously, you dragged the Legend around the chart. Notice that *Right* is selected (if not, select it).



9. Click **OK**.
10. Click in an empty area to de-select it.

Notice the Legend box.

Formatting the Chart

You are going to put a border around the chart, which your embedded charts had.

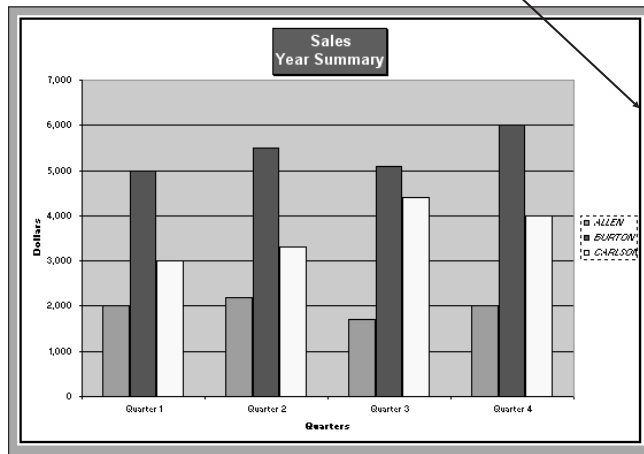
1. **Right-click below the Legend box.**

Notice that both the Shortcut menu appeared and the chart was selected.

2. Choose *Format Chart Area*.
3. Click the **Patterns** tab.
4. Choose *Automatic*.
5. For the *Style*, choose the first style, which is a single line.

6. For the *Weight*, choose the last weight, which is the thickest line.
7. Click OK.

Notice the border around the entire chart.



End of Lesson 14