

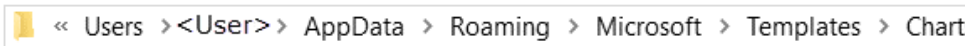
Activity 24 - Creating a Chart Template

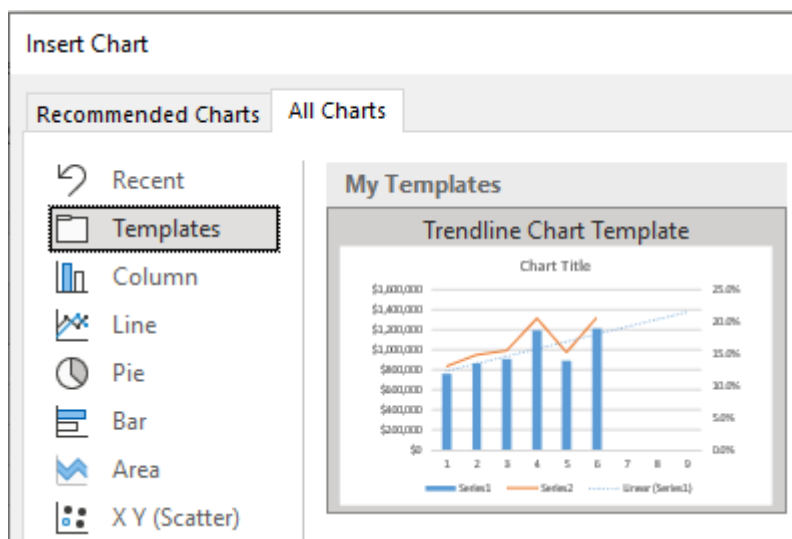
Before You Begin

The workbook My Annual Sales.xlsx is open.

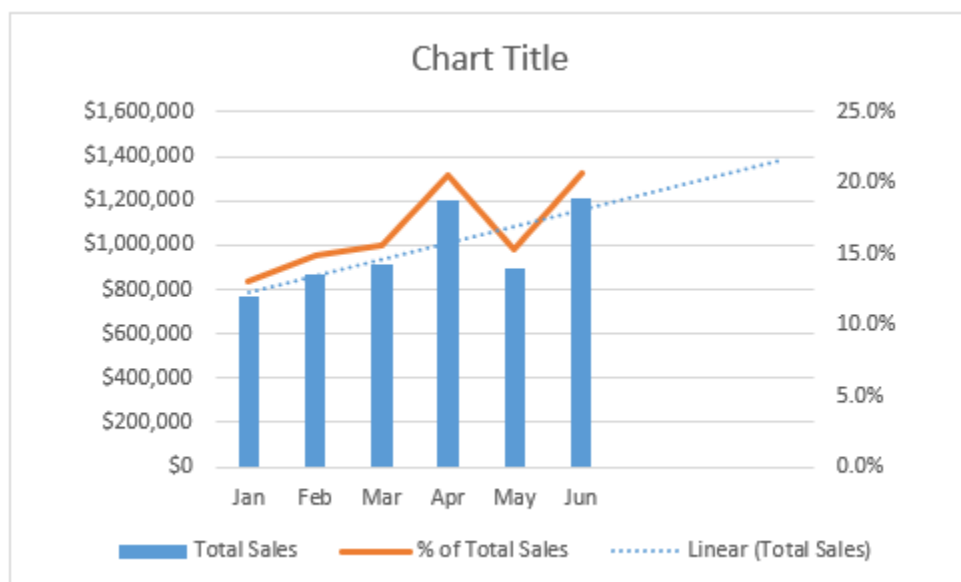
Scenario

You like the look and feel of the chart you created to forecast monthly sales. You know that you'll be creating similar charts for other sales periods. Instead of creating and manually adding elements to your charts each time you create them, you decide to create a chart template from the chart that you can apply to future datasets. You decide to test it on some data from the prior year, just to make sure the template works.

1. Verify that you are on the **Monthly Totals** worksheet, and if necessary, select the Monthly Totals combo chart.
2. Save the chart as a template.
 - a. Right-click the chart and then select **Save as Template**.
 - b. In the **Save Chart Template** dialog box, ensure the **Charts** folder is selected.
 - Excel should automatically direct you to the **Charts** folder. The label <User> in the chart templates path image will be your user name. The **AppData** folder is typically a hidden system folder, so you will not see the folder when browsing through File Explorer. However, you can type AppData in the address path to go to that folder directly.
 - c. In the **File name** field, type **Trendline Chart Template**.
 - d. Verify that the **Save as type** is **Chart Template Files (*.crtx)**, and then select **Save**.
3. Test the new chart template.
 - a. Select the **2021 Sales** worksheet.
 - b. Select the range **A1:C7**.
 - c. Select **Insert** → **Recommended Charts**.
 - d. In the **Insert Charts** dialog box, select the **All Charts** tab, and select the **Templates** category.
 - e. In the **My Templates** section, select the **Trendline Chart Template** and select **OK**.



- f. Verify that Excel created a dual-axis combo chart with a trendline.



- g. Move the chart to below the table, as necessary.

4. Save and close the workbook.