



How To Apply Excel Chart Templates (Office 2003 And Earlier)

Problem

You want to apply existing templates when exporting to PowerPoint, Word or Excel as Excel charts. To create these templates, see *How To Create Excel Chart Templates (Office 2003 And Earlier)*.

Steps to solve

1. In Q, go to the **Edit** menu and select **User Options...**
2. Select **Microsoft Excel (Office 2003 and earlier)** in the **Template system** menu
3. In the **Excel chart template** box browse for the *Excel* file that contains your template charts. Browsing ensures that the full path name of this file is included in the **Excel chart template** box.
4. Click **OK**
5. If exporting several charts at once, you will need to set the chart type associated with each table in the report before exporting to *Office*. To do this:
 - a. Select a table from the report you want to export as an Excel chart
 - b. Go to the **Edit** menu
 - c. Select **Table Options...**
 - d. On the **Exporting** tab select the type of chart you want from the **Chart** menu
 - e. Repeat for all tables you want to export as an Excel chart
6. Click the export button.
7. If exporting a single chart set the chart type in the **Chart** menu within the **Table Options** dialog box that appears after clicking the export button.
8. In the **Format** menu select any of **To Excel with Chart**, **To PowerPoint as Excel Chart** or **To Word as Excel Chart**.
9. Click **OK**.

For each chart to be exported, Q will inspect the *Excel* file nominated as the template file in Step 3 for the chart type. If the template file contains the desired chart type, this formatting will be replicated in the newly created chart. If the template file does not contain the chart type, Q will look for a similar chart type in the template file and, if one is found, Q will use the formatting of the similar chart type. If the template file contains neither the export chart type nor a similar chart type, Q will export the chart using the default settings specified in **Edit | User Options... | Export Chart Defaults**. See the Q Reference Manual for information about which chart types are considered similar.

Additional reading

Terms shown in italics and bold can be found in the index of the *Q Reference Manual*, the *Q Quick Start Manual* and via the **Help** menu within Q.

What to do if the problem is not solved

If these instructions are insufficient, please email us (**Help | Email Support...**) with a detailed description of what in the instructions is not working for you and we will either provide you with more comprehensive instructions, or, upon your request, we can do the analysis for you in your file (fees apply) .