

Too Many Infographics, Too Little Time: Save Time by Linking Excel and PowerPoint

CDP Annual Meeting Data Workshop - May 15, 2019 (Melissa Kelly)

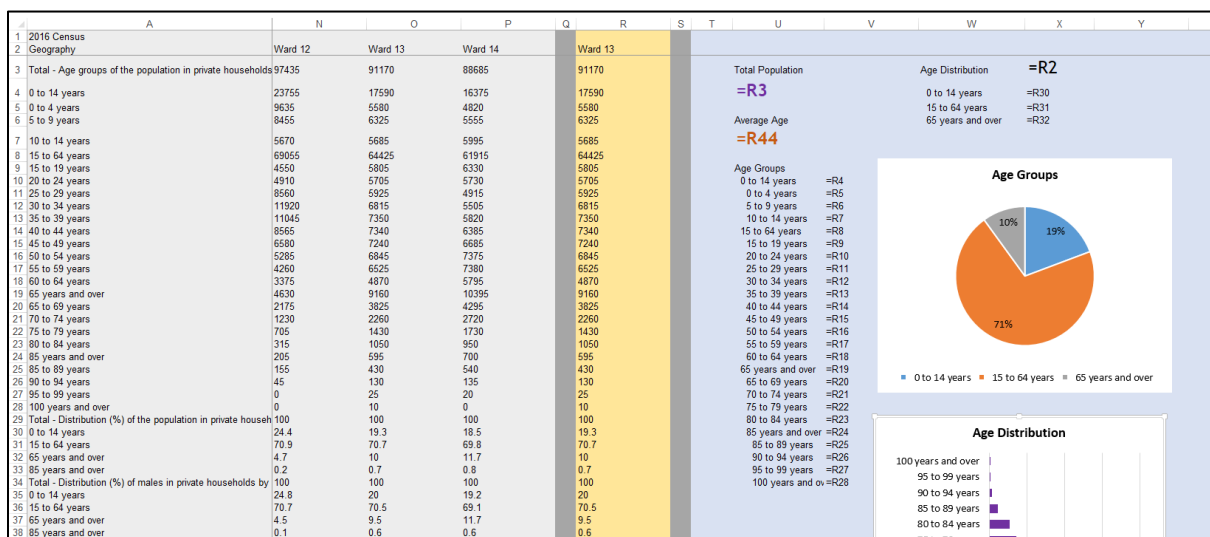
Introduction

In cases where separate infographics are required to show information for multiple different population groups or geographies, you can automate the process of updating the infographic by linking your Excel data sheet to an infographic template in PowerPoint.

For example, you may want to create a set of infographics to display demographic information for different areas of your community (e.g. quadrants, wards, neighbourhoods, etc.) or for different demographic groups such as seniors or immigrants.

The Basics

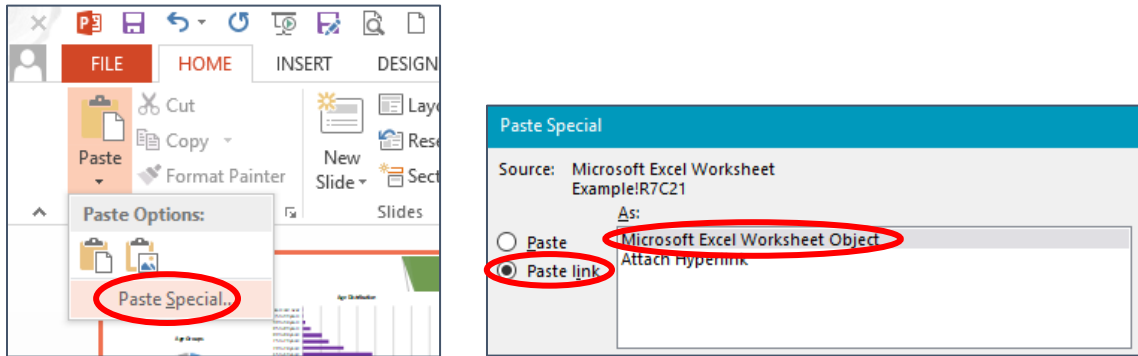
- In Excel, arrange your data in a way that allows you to quickly pull the information needed to populate your infographic.
 - One way to do this is to include all of the raw data in the Excel file and use tools like cut & paste or pivot tables to pull out what you want to show in your infographic.
 - For example in the screenshot below, the cells with the raw data are shown in grey. The blue cells show the information that will be used in the infographic. The blue cells pull information from the yellow column. This column is copy and pasted from the gray cells.



- In PowerPoint lay out your infographic, leaving space for content from the Excel file such as cells or charts.

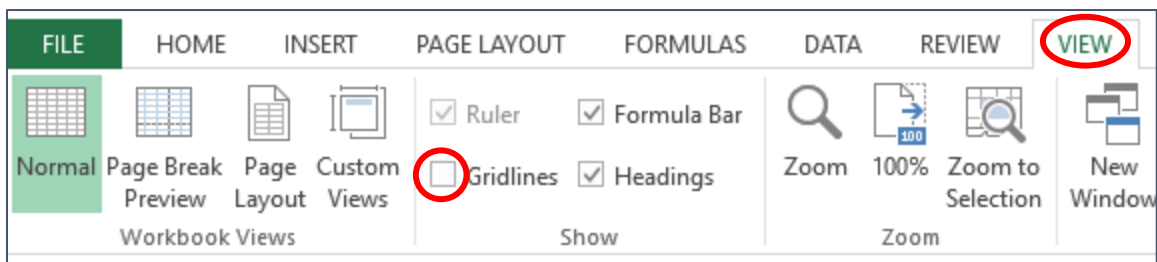
The Basics (continued)

- To import the Excel content into PowerPoint:
 - Copy it in Excel and use “Paste Special” feature in PowerPoint.
 - In the Paste Special dialogue box, choose the radio button for “Paste link” and select “Microsoft Excel Worksheet Object” or “Microsoft Excel Chart Object.”

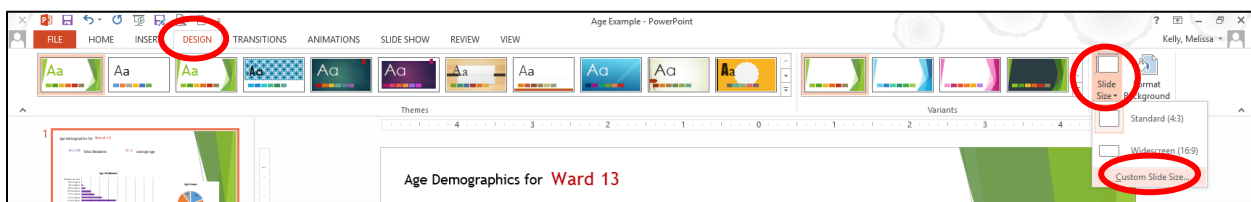


Formatting Tips

- In order for formatting to be applied to the various different infographics, the Excel objects need to be formatted in Excel. This includes font type, size and colour as well as size of charts and any chart specific options such as data labels, legends, etc.
- You will likely want to remove the gridlines in your Excel sheet so that the cells copied into PowerPoint don't have an outline around them.
 - To do this, select “View” from the ribbon at the top of the screen in Excel and then uncheck “Gridlines”.



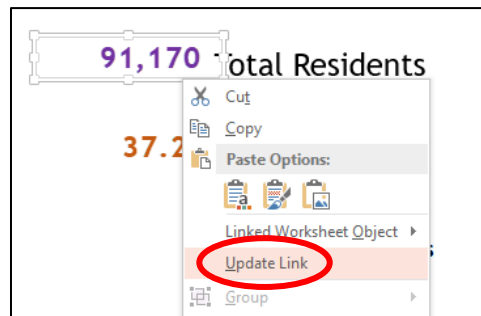
- Cells with text that is cut off in Excel will also show up that way in PowerPoint, so ensure that your column widths are wide enough to accommodate all text.
- To optimize for printing, ensure that slides are sized for letter paper. Go to “Design in the ribbon”, “Slide Size”, then “Custom Slide Size”. In the “Slide Size for” drop-down choose “Letter Paper (8.5x11 inches).”



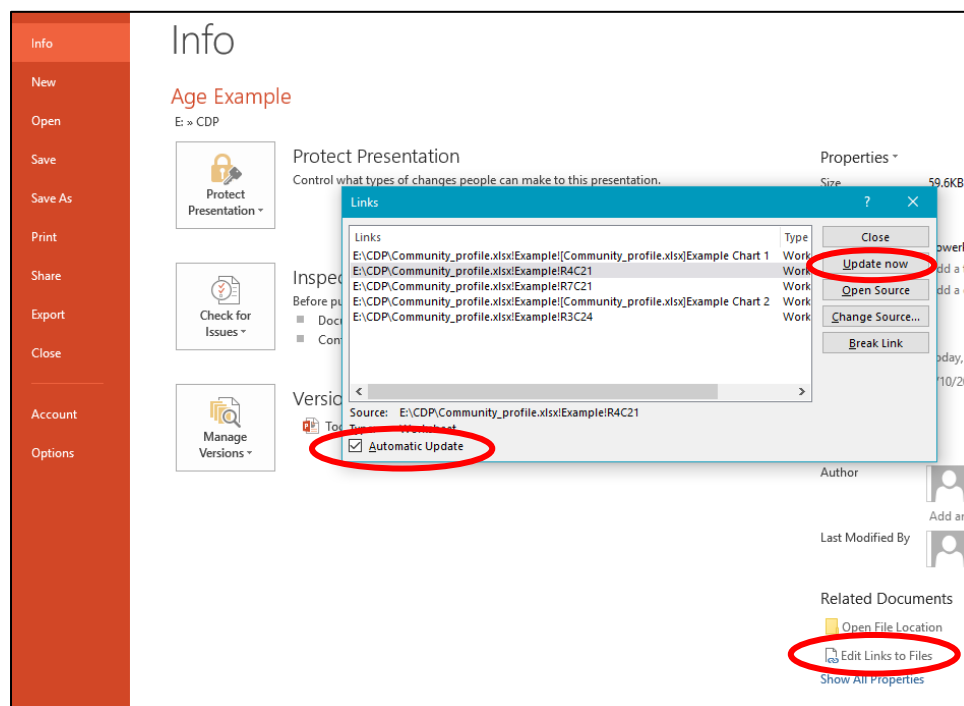
Updating Tricks

Sometimes the link between the Excel and PowerPoint files will update automatically and sometimes it is a bit finicky. If changes made to your Excel objects aren't reflected in your PowerPoint document, you can manually update them in the following ways:

- Save your Excel document.
- In PowerPoint, right click on an object and select "Update link".

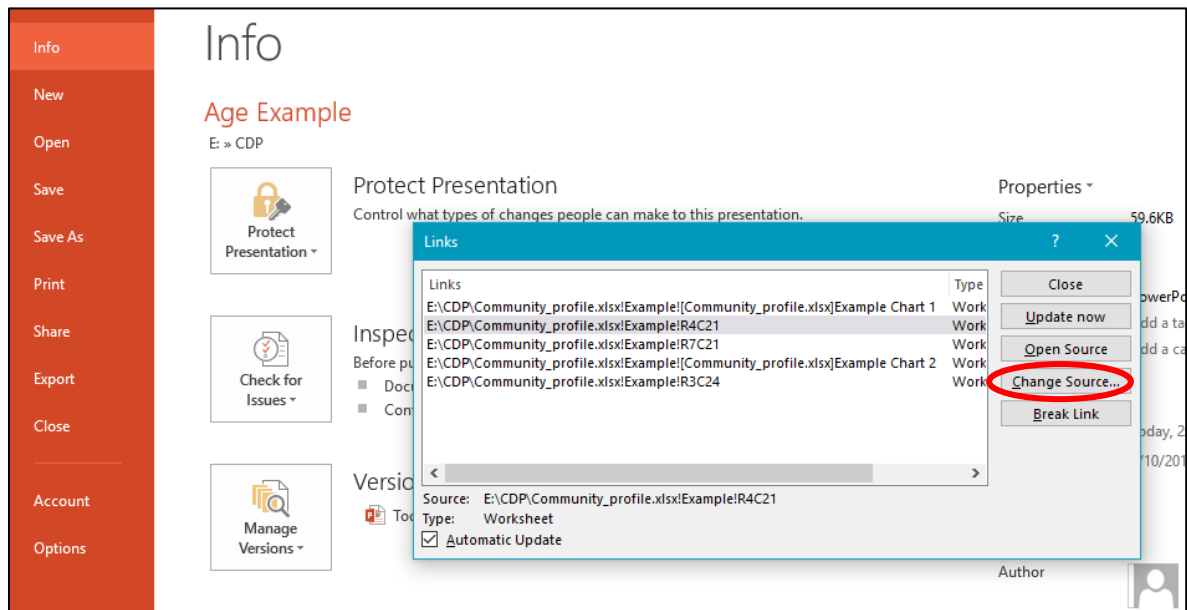


- In PowerPoint, select "File" from the ribbon at the top of the screen. In the "Info" screen, select "Edit links to files" in the bottom right corner. In the "Links" dialogue box, click "Update now" and also ensure that the "Automatic Update" box is checked.



Updating Tricks (continued)

- If these methods don't work, save and close your PowerPoint file. When you reopen it, select "Update links" in the dialogue box that comes up.
- ** Changing the name or location of your Excel sheet will break the links to the PowerPoint document. These links can be updated by selecting "File" from the ribbon at the top of the screen in PowerPoint. Then in the bottom right corner, select "Edit links to files". In the "Links" dialogue box, choose "Change Source", navigate to the appropriate file location and click "Open". **



Happy Infographic-ing!