

Creating Chart Templates with PowerPoint 2010

A capability introduced with PowerPoint 2007 makes applying a consistent chart treatment across your PowerPoint 2007/2010 slides as easy as a click of a button (or two). It's taken me a while to embrace this capability, but I would encourage any individual, or corporation, to use Chart Templates to help ensure consistency from slide to slide and presentation to presentation. I include instructions similar to the following in all templates that I build for individuals and corporations.

Prepare Your Templates

1. Create your first chart. If you've applied a Theme to your presentation, the chart colors will appear in the order that you've set them in said Theme. Figure 1 shows a Pie Chart that uses Theme Colors.

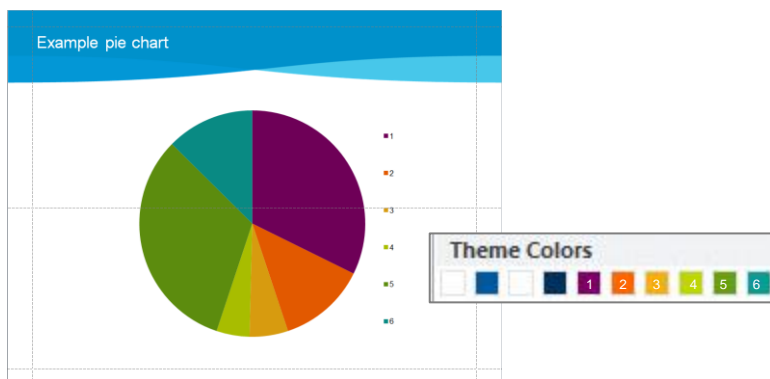


Figure 1

2. Select the chart (see Figure 2)
3. Click on Design in the Chart Tools Tab > Design
4. Click on Save As Template
5. Type Name of Template
6. Repeat for all Charts that need a template

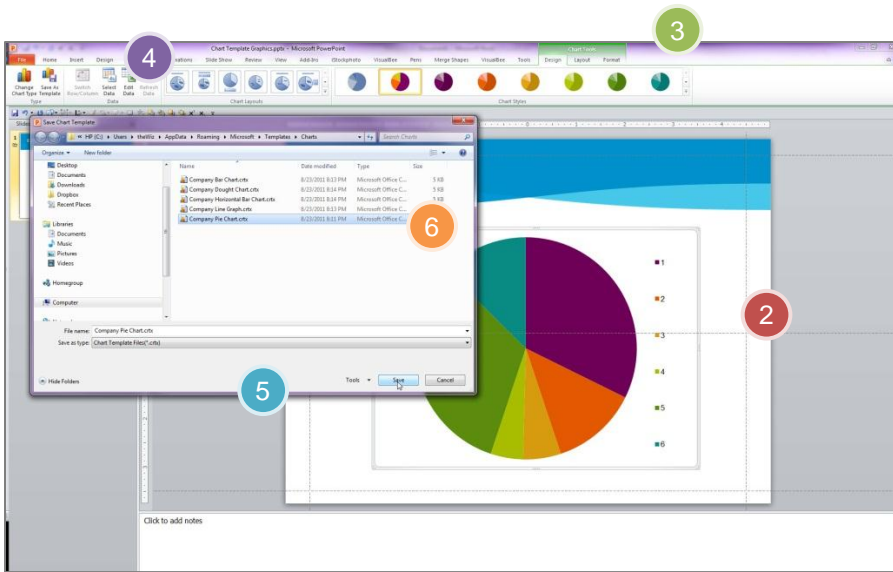


Figure 2

Apply Your Templates

When it's time to apply your saved templates to your old or new charts, just follow the steps below (also shown on Figure 3).

1. Select the Chart that needs to be changed
2. Click on Design in the Chart Tools Tab > Design
3. Click on Change Chart Type
4. Open the Template Folder
5. Click on Company Pie Chart > OK
6. Resize chart elements, if needed. Unfortunately, the tool isn't perfect. You may need to adjust your legend, plot area and chart size to make your newly formatting chart perfect – but using a template makes this effort a lot easier.

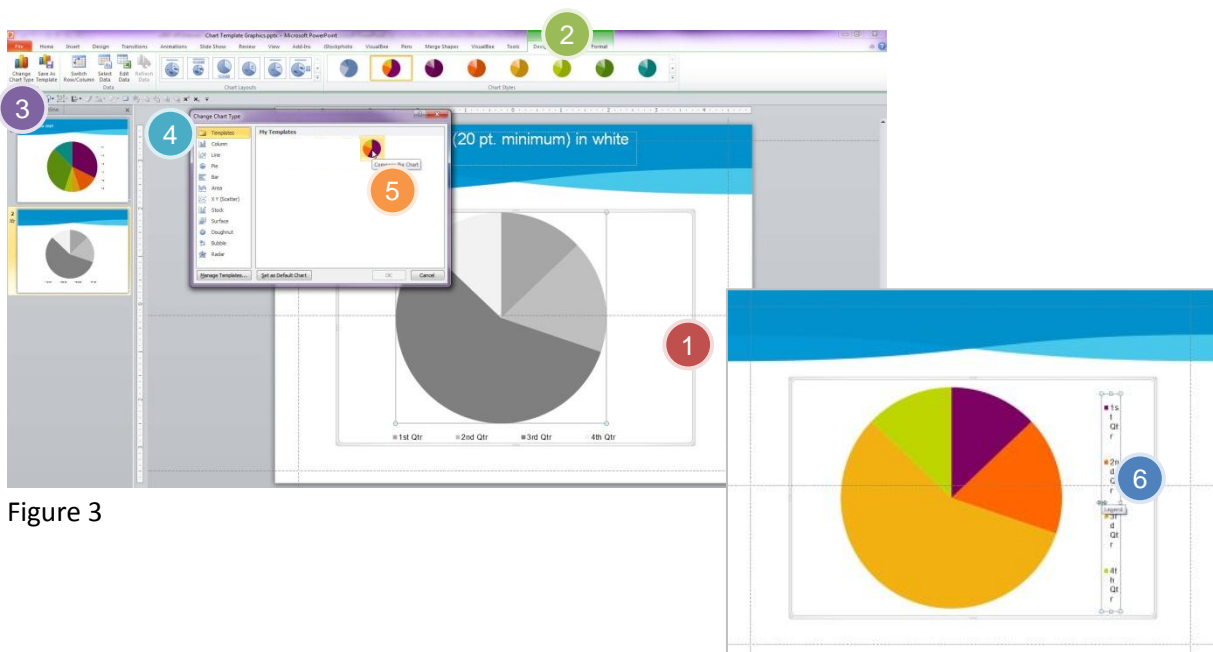


Figure 3

So, what happens if you are part of a large corporation and need to get these templates on all employees' computers? I consulted with my PowerPoint MVP colleagues, Echo Swinford and Troy Chollar, to better understand how these files can be "pushed" to all employees. At this point you'll probably need to get your IT department involved. Here are some points for consideration:

1. Who heads up Active Directory items?
2. Can your company setup a Group Policy to push these Microsoft .ctx Theme files to all users (.ctx is the file extension given to all chart templates)?
3. If you've created templates using the method above, you'll find them here:
C:\Users\UserName\AppData\Roaming\Microsoft\Templates\Charts.
4. If the "chart folder" is not present (for pushing), then a policy needs to be setup to create the folder
5. Note that all Microsoft Office applications will access that folder for the custom chart themes that are pushed out.

Another PowerPoint guru and MVP, Glenna Shaw, reminded me that many companies use SMS (Software Management System) to push out updates, etc. SMS can also be used to push Chart Template files.