



MINTEC

Mintec Analytics

LINKING EXCEL ADD-IN GRAPHS

TO A MICROSOFT

OFFICE DOCUMENT

The following instructions explain how you can add graphs from the Mintec Analytics **Excel Add-In** into a MS Word or PowerPoint document and then link these graphs to the document so that the process of updating these on a regular basis is less time consuming.

For adding graphs from a **Mintec Analytics** graph please follow the instructions in this link - [Linking Mintec Analytics graphs to a Microsoft Office Document](#)

IMPORTANT NOTE: Any information or any derivative works such as Mintec data, may only be shared with another party who has a license to view said information from Mintec.

/Step 1 – Data Download and Graph Creation in Excel

You will need to use the Mintec Excel Add-in to do this. If you have not used it before please watch the video linked below and follow the instructions for installing the Add-In first.

<https://www.mintecglobal.com/our-resources-training/data-direct>

Once installed, open Excel and click on the Mintec tab, sign in then click Insert Template.

Add the data series along the top of the page, add the date range, currency, unit and gap fill preferences for the chart(s) along the left hand side and then click Get Series Values.

Tip: *If you leave the currency and/or the unit blank it will add the values in as the native currency and/or unit*

Get Series Values will populate the date range and values for each data series entered. This data will become the contents of your graph(s).

Save the Excel document on your computer where you will be able to access it regularly.

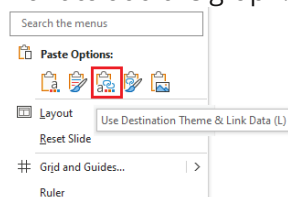
Select the data you wish to use in your graph(s) and create the graphs as you would normally in Excel. Create as many graphs as you need for your report.

Tip: *You might find it easier to create the graphs in a separate tab to the data download tab for future updating*

/Step 2 – Linking the Graphs to your Report

Open your Microsoft Office Word or PowerPoint document in readiness for adding the graphs. In Excel, copy any graph you wish to add to your report.

With the graph already copied, go to your Word/PowerPoint document and right click where you want to add the graph. Choose the Use Destination Theme & Link Data icon.

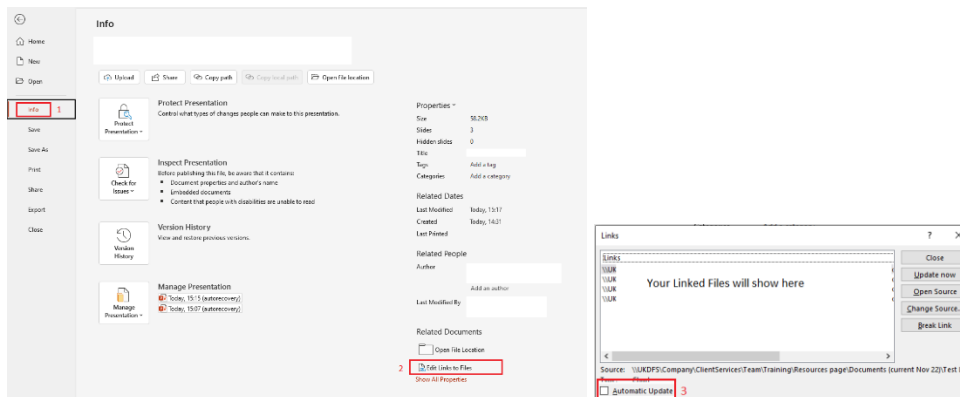


Please note that this icon will ONLY show if the graph in Excel has just been copied and not yet pasted

Once pasted, you can resize the graph and make design changes to it if needed. These changes will not affect the chart in the Excel document.

Once you have added all graphs, you need to ensure they will update *automatically* in the future. To do this, click the File tab and follow these steps and screenshots

1. Click Info on the left hand side
2. Click Edit Links to Files
3. Select each of the links and choose Automatic Updates, then click Close



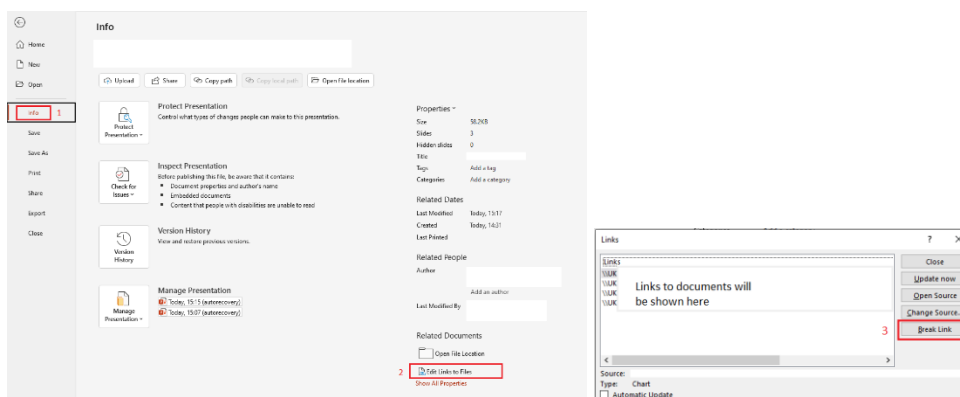
Save your Word/PowerPoint document as a **Master** template (i.e report name Master)

/Step 3 – Breaking Links before sharing

Before sharing your Microsoft Office document with others you will need to break the links with your document.

You do this in a similar way to the automatic update of links

1. Click Info on the right hand side
2. Click Edit Links to Files
3. Select each of the links and click Break Links, then click Close
4. Save the document as a **different name** to the Master template (i.e report name month year)

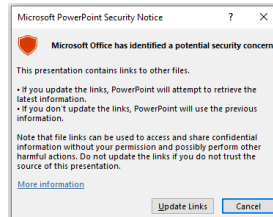


You can then share the newly named version as you need to, without any chance that the links will accidentally be removed.

/Step 4 – Updating the Report with new Data

When it comes time to update the report, you take a much shortened journey of the above

- a) Open the Excel document, change the date in the right hand side and click Get Series Values to get the more recent data from Mintec Analytics
- b) Check that the date ranges in your graphs cover all the new data that has been downloaded
- c) Open your Word/PowerPoint **Master** report
- d) Depending on your company security settings you may see this screen. Click Update Links to continue



- e) When the document opens, all the graphs should be automatically updated with the new data
- f) Save the Master template report
- g) Repeat Step 3 for breaking links and save as a new file before sharing your report



MINTEC

✉ support@mintecglobal.com

☎ +44 (0) 1628 648710